



SOCIAL SERVICES WORKFORCE IN EUROPE: STATE OF PLAY AND CHALLENGES

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The Social Services Workforce in Europe: Current State of Play and Challenges

Report

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Foreword

We knew that social services were one of the biggest job creators in Europe today, are contributing significantly to the European economy and are also playing a crucial role in the implementation of the European Pillar of Social Rights. However, we were lacking precise data on the sector's workforce and challenges.

This led to the creation of Social Employers' Observatory, whose first task has been to launch a study on employment, industrial relations, qualifications and training, working conditions and the main challenges facing the social services sector across Europe.

The task force in charge of the observatory decided to launch this study on the basis of official European data and a survey of the membership of social employers whom we thank for the time spent and their important input.

To guarantee the quality of the study, the task has been assigned to an independent consultant, Frederic Turlan, managing director of Industrial Relations Share in the framework of the PESSIS+ project, that received financial support from the European Union.

We hope this report will provide all stakeholders interested in social services with relevant information to further develop this crucial sector.

Sylvain Renouvel
Chair of Social Employer's
Observatory

The Federation of European Social Employers (Social Employers) represents the voice of employers in the field of social services at European level. It understands social services to comprise all care and support services, especially those pertaining to:

- elderly people,
- people with disabilities,
- children,

and other excluded and disadvantaged persons.

To learn more about the Federation, please visit: <http://socialemployers.eu/en/>



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Introduction

This report is based on three main sources:

- Answers provided by Employer organisations affiliated with Social employers and representing 10 Member States, on a questionnaire sent in May 2019.
- A set of data kindly extracted by Eurofound from its sixth European Working Conditions Survey¹, related to the NACE codes 87 and 88. The European Working Conditions Survey is based on a random sample of workers (employees and self-employed individuals) who were interviewed in person. The sixth survey, carried out in 2015, interviewed nearly 44,000 workers in 35 countries. Its findings provide detailed information on a broad range of issues, including exposure to physical and psychosocial risks, work organisation, work–life balance, and health and well-being.
- A set of statistics kindly extracted by Eurostat from its Labour Force Survey 2018. Eurostat has extracted data for Residential care activities (NACE 87) and Social work activities (NACE 88).

This report contains six chapters. The first chapter focuses on employment data mainly provided by Eurostat, based on the labour force survey. It highlights the strong job creation dynamic in the social services sector. The second chapter provides an overview on social dialogue and industrial relations in the social services sector. The third chapter focuses on qualifications and skills, with some inputs from the European Working Conditions Survey conducted by Eurofound. This survey is also the main source used for chapter 4, which looks at working conditions. Chapter 5 provides data on wages and purchasing power of employees in the social services sector. Finally, the report provides an overview on the main challenges faced by the social services sector in the area of human resources management. This overview is based on answers provided by the national members of the Federation of European Social Employers (Social employers).

The report has been drafted by Frédéric Turlan, manager of IR Share. [IR Share](#) is a privately- owned, independent, apolitical company whose aim is to inform and assist all players involved in social dialogue within and outside Europe. It has been the correspondent organisation for France of the [European Foundation for the Improvement of Living and Working Conditions](#) since 2009. IR Share also provides a fortnightly newsletter, IR Notes, produced with its network of experts and which is available in several European languages (English, French, German, Italian, Spanish). It offers Europe-wide monitoring of employment law, labour relations and employment policy.

¹ Eurofound (2017), *European Working Conditions Survey Integrated Data File, 1991-2015*, [data collection], UK Data Service. SN: 7363, <https://doi.org/10.5255/UKDA-SN-7363-4>.



1. Employment

An important sector in terms of employees

The social services sector employed about 10.9 million people in 2018 in the EU, for a total labour force of 230.4 million persons in 2018, according to the Eurostat Labour Force Survey. The social services sector represents 4.7% of the EU labour force.

Table 1: Total sectoral workforce (Residential care activities - NACE 87. + Social work activities - NACE 88), per country (workers over 15 years old (in thousands, in 2018), from the smallest country to the largest.

Countries	Social service workforce
CY	3,800
MT	9,700
EE	11,700
LU	17,200
LV	19,200
LT	21,200
SV	22,000
HR	27,600
EL	35,700
BL	50,400
RO	81,200
SK	83,000
CZ	105,100
HU	119,800
IE	121,000
AT	172,100
PT	195,300
FI	228,600
PL	285,000
DK	325,900
BE	373,700
SE	428,000
ES	521,900
IT	572,500
NL	707,800
UK	1 959,700
FR	2 020,000
DE	2 399,700
EU	10 918,600

Source: EUROSTAT, Labour Force Survey, extraction for Residential care activities (NACE 87) + Social work activities (NACE 88). Employment by sex, worker aged 15 and over ²

² Household survey where people who are employed have indicated the sector they work in.



Table 2: Total workforce per country and total sectoral workforce (Nace 87 +, Nace 88), per country, and share of social services workforce in comparison to the total workforce (workers over 15 years old, in thousands, in 2018)

The share of social services employees in comparison to the total workforce varies a lot between the Member-States. In addition, Nordic countries (DK, FI, NO, SE) provide the largest share, around 10% of the total workforce, i.e. more than double the EU average.

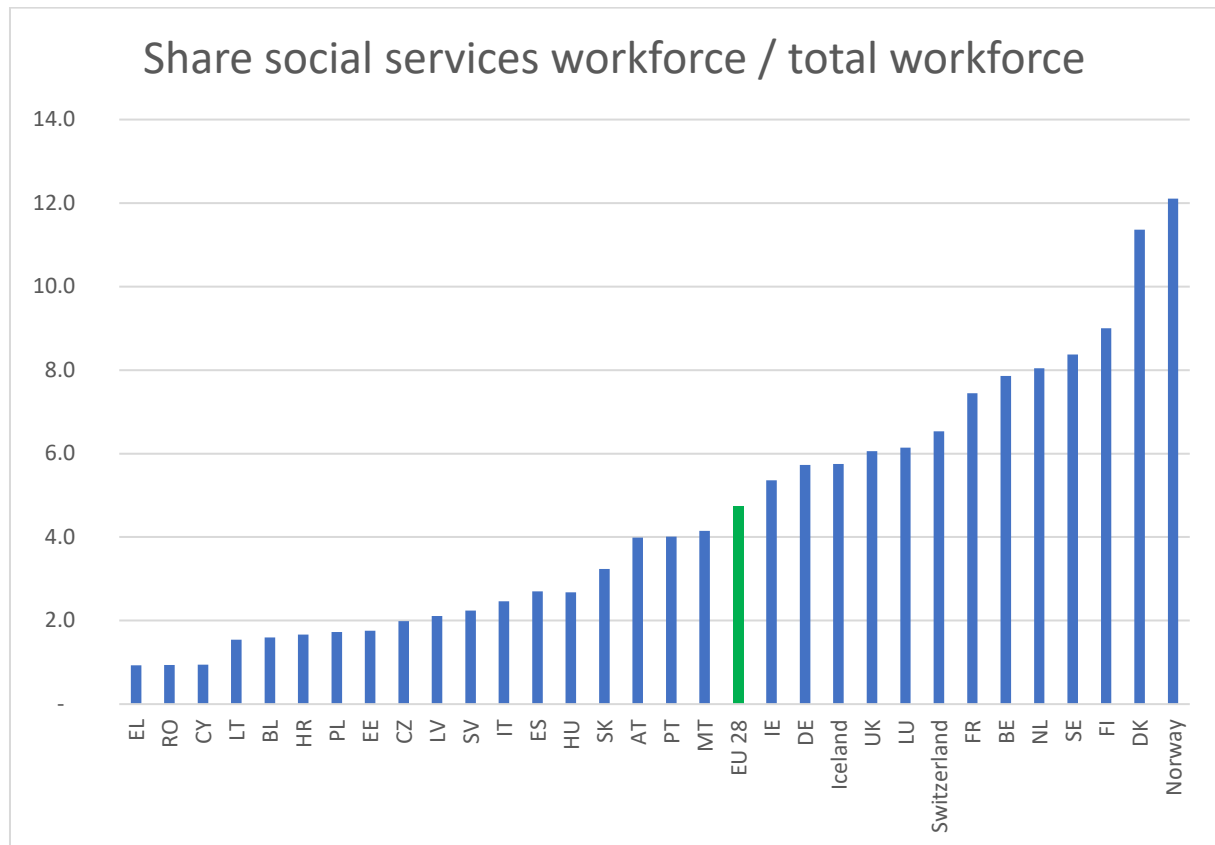
	Total workforce	Social service workforce	Share social services workforce / total workforce
AT	4 319,000	172,100	4.0
BE	4 755,200	373,700	7.9
BL	3 152,700	50,400	1.6
CY	400,900	3,800	0.9
CZ	5 293,800	105,100	2.0
DE	41 914,500	2 399,700	5.7
DK	2 867,900	325,900	11.4
EE	664,700	11,700	1.8
EL	3 828,000	35,700	0.9
ES	19 327,700	521,900	2.7
FI	2 539,900	228,600	9.0
FR	27 122,200	2 020,000	7.4
HR	1 655,000	27,600	1.7
HU	4 469,500	119,800	2.7
Iceland	198,300	11,400	5.7
IE	2 257,500	121,000	5.4
IT	23 214,900	572,500	2.5
LT	1 374,700	21,200	1.5
LU	279,900	17,200	6.1
LV	909,400	19,200	2.1
MT	234,200	9,700	4.1
NL	8 798,000	707,800	8.0
NO	2 685,800	321,100	12.10
PL	16 484,000	285,000	1.7
PT	4 866,700	195,300	4.0
RO	8 688,500	81,200	0.9
SE	5 112,600	428,000	8.4
SK	2 566,700	83,000	3.2
SV	980,600	22,000	2.2
Switzerland	4 675 300	305,400	6.5
UK	32 354,100	1 959,700	6.1
EU	230 433,000	10 918,600	4.7

Source: EUROSTAT, Labour Force Survey, extraction for Residential care activities (NACE 87) + Social work activities (NACE 88). Employment by sex, worker aged 15 and over³

³ Household survey where people who are employed have indicated the sector, they work in.



Graph 1: Part of the workforce of social services in comparison to the total EU workforce in 2018



Source: EUROSTAT, Labour Force Survey, extraction for Residential care activities (NACE 87) + Social work activities (NACE 88). Employment by sex, worker aged 15 and over ⁴

According to the survey launched to the national correspondents of the Federation of European Social Employers (Social employers)⁵, the data issued from Eurostat seem to be reliable, except for : 1° **Slovakia**, where the data are estimated to be too high (83,000 people, according to Eurostat, but probably no more than 60,000 people according to the national correspondent, who highlighted that the increase of 63% since 2008 is over-estimated). 2° **The Netherlands**, where the national correspondent provided higher data for 2017 (740,325 in comparison to the 691,600 figure provided by Eurostat, and less in 2016, 713,835 in comparison to the 717,300 figure provided by Eurostat).

⁴ Household survey where people who are employed have indicated the sector, they work in.

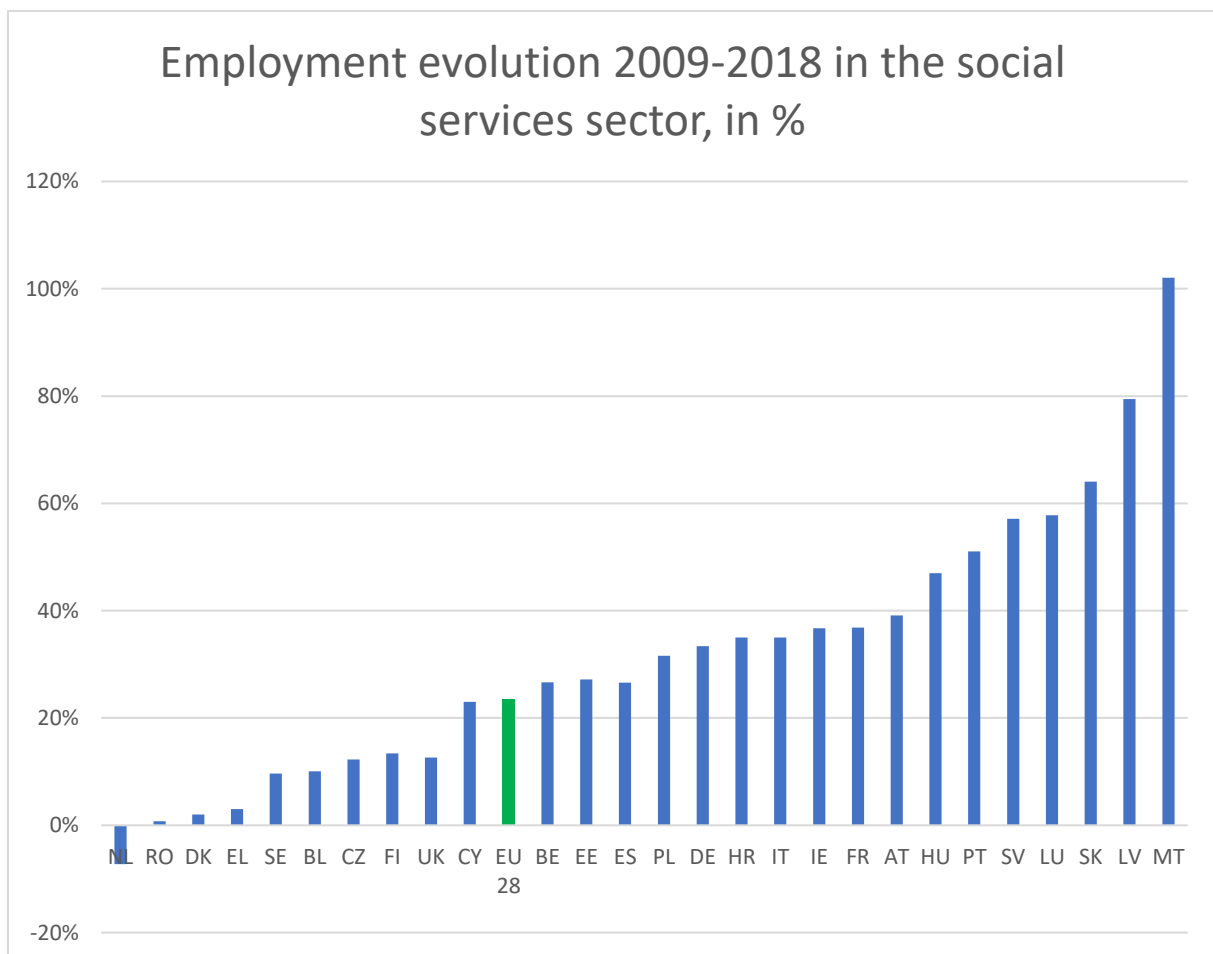
⁵ Jiri Horecky – Association of social services providers (CZ), Kristina Kovacs, Association of social services providers in the Slovak Republic (SK), Antonion Molina Schmid, LARES (ES), Bernhard Berckenbrinck, Arbeitgeberverband AWO Deutschland e.V. (DE), Mathieu de Poorter and Elise Lay, UNIPSO (BE), Patrikas Skrudupis, LARG (LT), Sylvain Renouvel, Nexem (FR), Tuomas Mänttari, Hyvinvointiala HALI (FI) ; Netty Klein, COPAS (LU) ; Michiel Kooijman ActiZ (NL).



A strong employment dynamic

The social services sector has a strong employment dynamic with **an increase of 24% in the number of people (aged 15 and over) employed between 2009 and 2018** (green column in graph 2) while the entire EU workforce increased about 5% during the same period. Sectors such as metallurgy and the food industry have experienced a significant decline in their workforce, –39% and –20% respectively. However, developments at the national level are mixed. One Member States experienced a fall in employment in this sector (NL) and three others an increase of less than 10% (RO, DK, EL). At the other end of the spectrum, seven countries saw employment growth of more than 40% (HU, PT, SV, LU, SK, LV, MT)⁶.

Graph 2: Employment evolution 2009-2018 in the social services sector, in %



Source: EUROSTAT, Labour Force Survey, extraction for Residential care activities (NACE 87) + Social work activities (NACE 88). Employment by sex, for workers aged 15 and over⁷

⁶ Data for EE and LT are not reliable (data for Nace code 88 are missing for 2008), but the workforce has increased in both countries.

⁷ Household survey where people who are employed have indicated the sector, in which they work.



According to the survey launched by the Federation of European Social Employers (Social employers), almost all the interviewed employers' organisations believe that the number of employees is expected to increase further in the next two years (BE, ES, DE, FI, NL), in particular due to the growing needs of the population, particularly care of the elderly (FR, LT), and new services (FR). In **Slovakia** and **Germany**, the number of employees would not, according to the national correspondents, increase proportionately to the increasing number and needs of the elderly. Some Eastern European countries also have to cope with an increase in migration of staff to other EU Member States that may reduce the structural increase of the social services workforce. However, as mentioned by the Czech correspondent, wages and salaries in new Member states like **Czech Republic, Poland, Romania, Slovakia** are currently growing, and migrant workers tend to slowly return to their countries of origin.



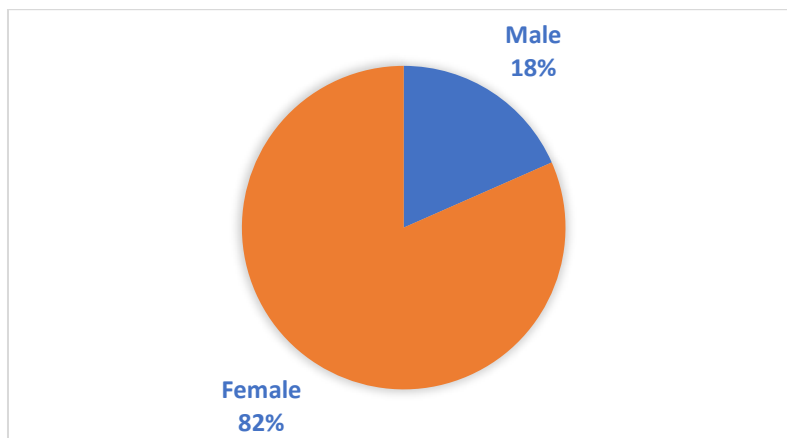
Migration

According to the report *Project PESSIS +: Promoting employers' social services in social dialogue*⁸, in several countries, a relatively high proportion of social services workers are migrant workers, in for example, Austria, the Netherlands and the United Kingdom. In some Central and Eastern European countries, social services workers leave to work in other European countries in search of higher wages, which results in a 'care deficit'. Countries then have to recruit social services workers from other countries, e.g. Ukraine, Vietnam.

Distribution of female and male employment in the social services sector in 2018

In 2018, employment in the social services sector remained overwhelmingly female. In the European Union (28 members), women represented 81.56% of total social services employment (see Graph 3 and 4). The female employment rate in this sector exceeded 90% in two Member States (PT, SK). In only five Member States, the proportion of men exceed 20% (DE, LU, AT, SE, UK). Germany is the only country where men represented almost a quarter of the workforce (24.8%)⁹. According to the national statistics, they represented 32% of the workforce under Nace code 88 and 20% under Nace code 87. But for both Nace codes together, the rate was 19.5%.¹⁰

Graph 3: Share of female and male jobs in social services at EU level in 2018



Source: EUROSTAT, Labour Force Survey, extraction for Residential care activities (NACE 87) + Social work activities (NACE 88). Employment by sex, for workers aged 15 and over¹¹

⁸ Lethbridge J. *Project PESSIS +: Promoting employers' social services in social dialogue*, Final European Report 2019, May 2019.

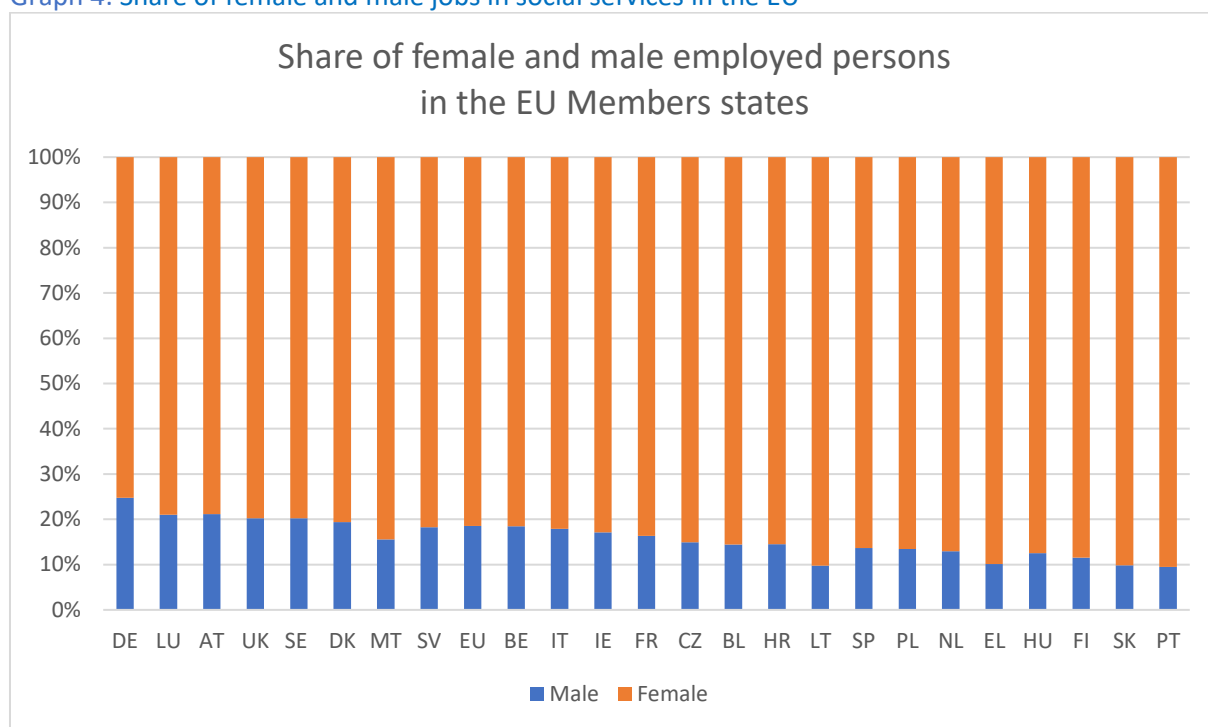
⁹ Data for EE, LT and RO are not reliable and do not figure in this graph.

¹⁰ Statistik der Bundesagentur für Arbeit. Tabellen, Beschäftigte nach Wirtschaftszweigen (WZ 2008) (Quartalszahlen), Nürnberg, März 2019. <http://statistik.arbeitsagentur.de/Navigation/Statistik/Statistik-nach-Themen/Statistik-nach-Themen-Nav.html>

¹¹ Household survey where people who are employed have indicated the sector, in which they work.



Graph 4: Share of female and male jobs in social services in the EU¹²



Source: EUROSTAT, Labour Force Survey, extraction for Residential care activities (NACE 87) + Social work activities (NACE 88). Employment by sex, worker aged 15 and over, in thousands and percentages. Data for EE, CY, RO, LI, HR, SV are not fully reliable.

According to the survey sent to the national correspondents of Social Employers, the data issued from Eurostat seem to be reliable, though the high rate of female employment in France seems to be slightly overestimated according to observations on the ground.

Employment in the social services sector broken down by age in 2017

The 25-49 age group is of course the largest in the social services sector in the European Union (see Graph 5). It represents 57% of total employment, with relatively little difference between the sexes: 56.7% for women and 59.7% for men.

The 50-64 age group represents more than a third of total employment in the social services sector (34.6%), compared to 29.6% for the whole economy, and poses many challenges for operators in the sector, in terms of active ageing and recruitment to replace those staff who will retire in the coming years. Paradoxically, according to the Social employers' correspondents, this subject is rarely addressed by public policies or by the social partners in the sector.

Again, gender variations are moderate, with this age group accounting for 35% of female employment and 31% of male employment.

¹² Data for EE, LT and RO are not reliable et don't figure in this graph.



Caution should be used when reading the results by country given that the European Labour Force Survey sometimes covers only a small number of workers. Countries with the least reliable data, according to Eurostat, have been excluded from graph 5. Nevertheless, some results do not necessarily reflect reality, such as the lack of data on employment of 15-24-year-olds in some countries (PL). However, there are significant differences at the national level, where for example, the 50-64 age group exceeds 35% (DK, DE, NL, FI). This range is smaller, around 29% to 32%, in 5 countries (BE, IE, IT, AT, PL).

Graph 5: Employment in social services broken down by age, in 2017 (in %)¹³ from the country with the smallest 54-60 years old group (AT) to the largest (DE)

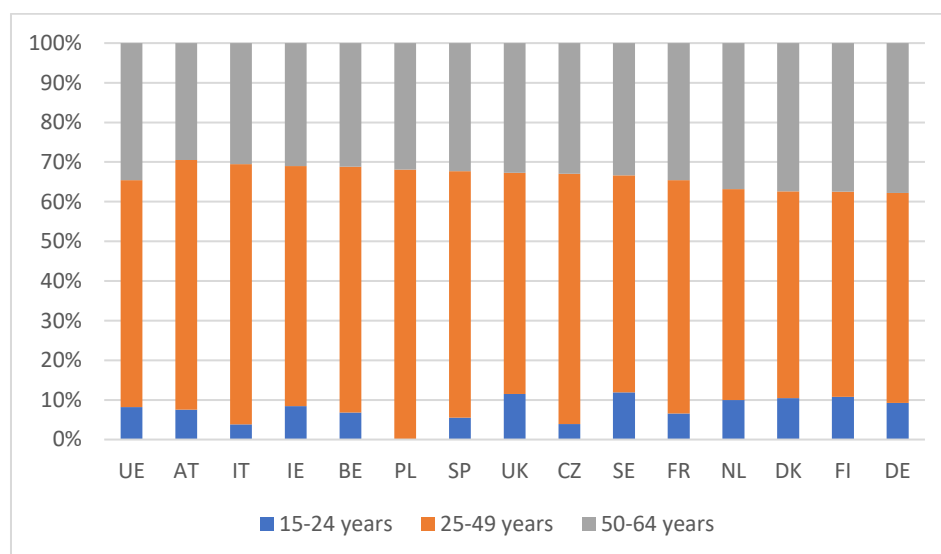


Table 3: Employment in social services broken down by age, in 2017 (in %)

	15-24 years	25-49 years	50-64 years
UE	8,21	57,19	34,60
AT	7,50	63,03	29,47
BE	6,83	61,99	31,18
CZ	3,94	63,12	32,94
DE	9,27	52,96	37,77
DK	10,47	52,14	37,38
FI	10,81	51,71	37,48
FR	6,56	58,85	34,58
IE	8,39	60,56	31,05
IT	3,79	65,69	30,52
NL	9,99	53,19	36,82
PL	0,00	68,07	31,93
SE	11,90	54,72	33,38
SP	5,55	62,14	32,31
UK	11,53	55,79	32,68

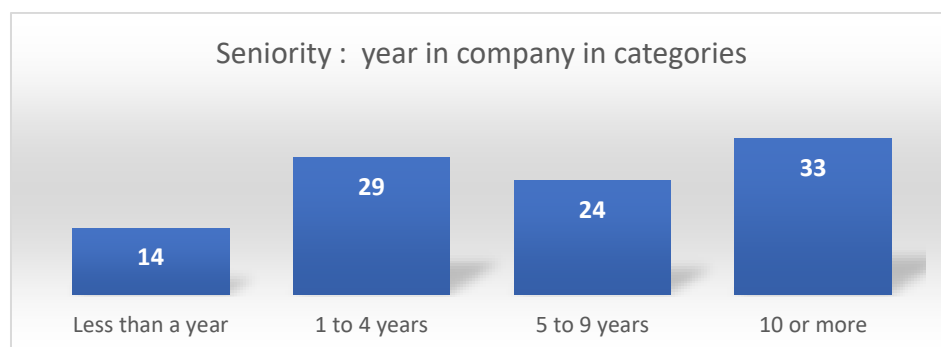
¹³ This graph and the table below are based only on the countries with the most reliable data. There is no data for the 15-24 year old age group for Poland.



Seniority

According to the European Working Conditions Survey¹⁴, 57% of the employees in the social services have more than 5 years of experience with the company (in comparison to 79% for the whole economy) and 14% of the employees have seniority of less than a year. In the sector, 29% of the employees have a seniority of 1 to 4 years in the company, in comparison to 21% for the economy as a whole. There are some variations between countries with some new Member States reporting higher seniority with a share of 10 years or more over the average of 32%, as in Hungary (60%), Bulgaria (45%), Czech Republic (48%), Poland (45%) or Croatia (42%). France (46%, maybe due to the standardized wage grid that provides higher salaries for employees at the end of their careers) and Greece also have higher seniority levels.

Graph 6: Seniority in social services broken down by year groupings (in 2015)



Source: EUROFOUND (2016), European Working Conditions Survey¹⁵

Employment relations

In the social services sector, permanent employment contracts remain the norm. This type of contract concerns more than half of the workforce in seven of the ten countries that participated in the Social Employers survey (see countries in dark blue on graph 8: BE, DE, ES, FR, LU, LT, NL). It represents between 25% and 50% of the workforce in four other Member states (see countries in light blue Graph 8). Public sector jobs, that offer high employment stability, are also well represented, mainly in Eastern European countries (CZ, SK) and Northern European countries (FI) where they represent more than half of the jobs in the sector (see countries in dark blue, graph 9) or between 1/4 and 1/2 for LT (see country in medium blue Graph 9). In a majority of Member states, the share of public contracts is less than 25% (see countries in light blue, in Graph 9). The use of fixed-term contracts represents less than 25% of the workforce in all countries. Temporary agency workers remain very minimal in all countries.

¹⁴ In the framework of the European Working Conditions Survey a random sample of workers (employees and self-employed) was interviewed in person. In 2015, Eurofound carried out its [sixth survey](#). This sixth survey interviewed nearly 44,000 workers in 35 countries. Its findings provide detailed information on a broad range of issues, including exposure to physical and psychosocial risks, work organisation, work-life balance, and health and well-being. Eurofound has kindly extracted data from this sixth survey related to the NACE codes 87 and 88, used in this study.

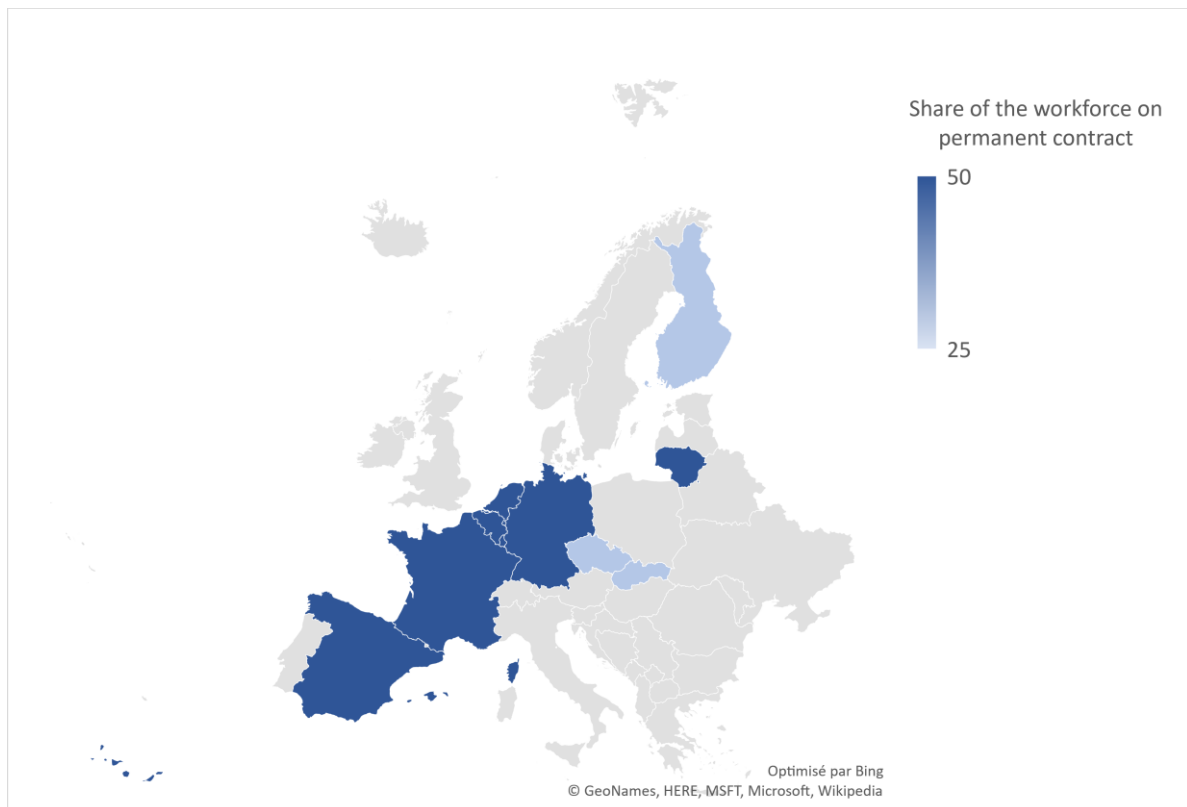
¹⁵ Eurofound (2017), *European Working Conditions Survey Integrated Data File, 1991-2015*, [data collection], UK Data Service. SN: 7363, <https://doi.org/10.5255/UKDA-SN-7363-4>. Eurofound has kindly extracted data from this sixth survey related to the NACE code 87 and 88, used in this study



Structure of the sector

As highlighted in the report “Project PESSIS +: Promoting employers’ social services in social dialogue”¹⁶, comparing national social services data to obtain a complete picture of the contribution of public, for-profit and not-for profit actors to overall social services provision is difficult because of the use of different terminology in each country. Although several countries, such as, Finland, Bulgaria, Lithuania, still have a large public sector provision, the contributions of not-for-profit and for-profit sectors are growing throughout the 25 study countries. In Italy, the not-for-profit sector provides 73% of social services. In Bulgaria, Hungary, Slovenia and Poland, there has been some expansion of the not-for-profit sector. There is some evidence that the not-for-profit sector specialises in certain types of services, for example, caring for people with disabilities in France. Childcare provision is most often found in the for-profit/ not-for-profit sectors.

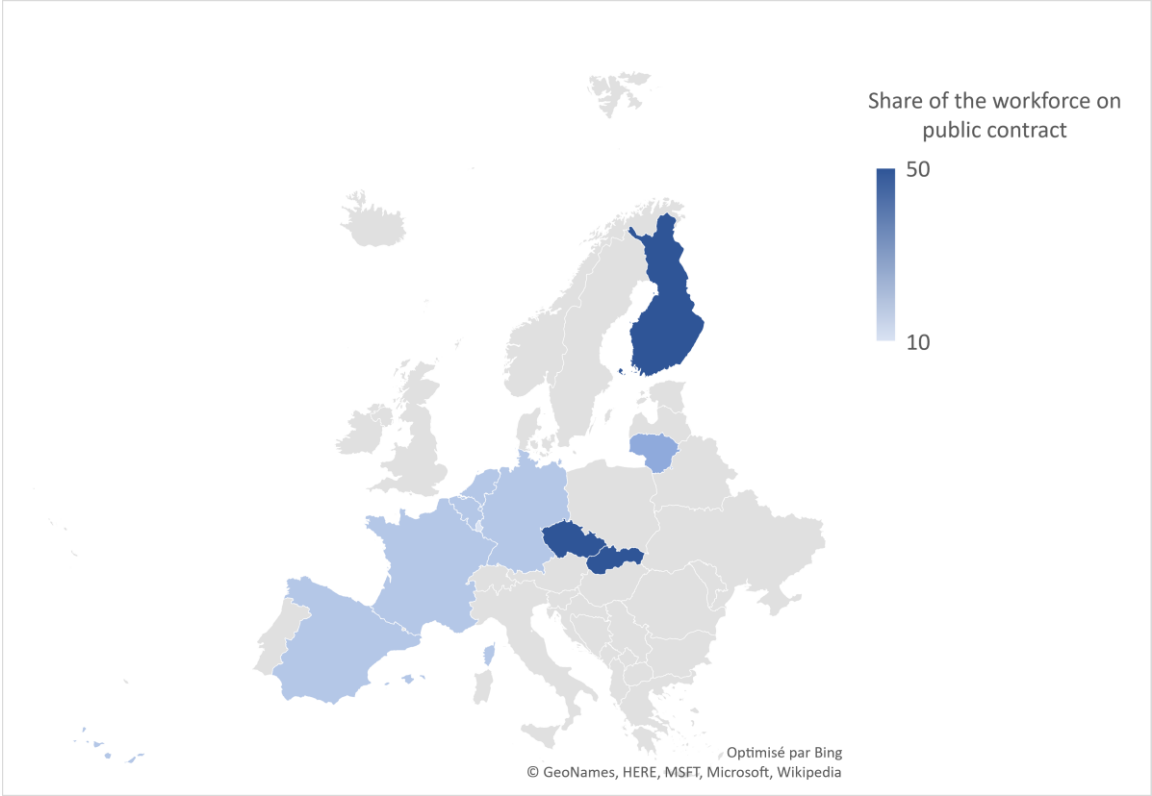
Graph 7: Private law permanent employment contracts and their weight in the national labour market



¹⁶ Lethbridge J. *Project PESSIS +: Promoting employers’ social services in social dialogue*, Final European Report 2019, May 2019



Graph 8: Public employment contracts (civil servants, workers employed by local authorities, etc....) and their weight in the national labour market



2. Industrial relations

One of the characteristics of social relations in the social services sector is that these services are provided by both public sector organisations, as well as private, for-profit and non-profit organisations. Thus, depending on the country, the system of industrial relations is closely related to the weight of the private sector and the public sector in the different countries. In the private sector there is significant social dialogue and collective bargaining (see below), while another part of the sector is governed by the industrial relations in the public sector. Sometimes, as in Lithuania, social dialogue can even be tripartite. In some countries, social services are mainly provided by the private non-profit sector (FR, NL where this is 90%, only 2% of social services depending on the public sector) or to a significant extent by the private, for-profit and non-profit sector (40% in Spain and Slovakia). In other countries, the public sector represents the majority (FI, LT, SK). There are also structural differences within countries depending on the activities. In Finland, the private sector accounts for 40% of the social services covered by the NACE code 87, but only 18% of the services covered by the NACE Code 88.91. In Germany, 50% of the elderly care is managed by private providers, and 50% by not-for-profit providers or public providers. In social work there are no for-profit private providers, but many not-for-profit providers which are publicly funded. These differences in market structure between countries therefore have an impact on the functioning of social relations in the sector.

Collective bargaining

Social dialogue is strong in the social services sector. All national correspondents of Social employers who responded to the survey highlighted that collective bargaining exists in their sector, mainly on different levels (company, branch/sector), accordingly to the national collective bargaining norms. These responses confirm the results of the Pessis 3 study¹⁷ which mentioned that “all of the twenty-two countries have some form of collective bargaining agreements covering all or part of the social services sector”. Furthermore, in some countries, collective bargaining practices are observed at all collective bargaining levels (BE, FR). Collective bargaining is also important in the New member states where it is generally weak in the economy overall (CZ, LT, SK).

¹⁷ Project PESSIS 3: Promoting employers' social services in social dialogue, Final European Report, 3 July 2017



Table 4: Collective bargaining level and issues per level (2019)

Countries	Collective bargaining level			
	National	Inter-sector	Sector/Branch	Company
BE	Minimum wage, vocational training, part-time schemes (Crédit-temps)	Annual bonuses, increases in pay scales, extra days off, bonuses for “uncomfortable hours”, early retirement....	Job scales and descriptions, employment in “at-risk groups”, early retirement, annual bonus, additional leave days, number of vocational training days	Additional benefits (meal vouchers) or additional days off
CZ	National Tripartite annual negotiation about minimum wage, working conditions and the Labour Act (but not specific to the sector)		Remuneration	Remuneration, work conditions and safety
DE			Grid of wages, working-time, classification, holidays, night-shift work, shift work, annual bonuses	Grid of wages, working-time, classification, holidays, night-shift work, shift work, annual bonus
ES	Wages and all working conditions		Wages and all working conditions	
FI			All issues	
FR	All issues	All issues. A new EO confederation has been set up to negotiate on cross-sectoral issues	All issues	All issues, especially working time, eg. night shifts.
LT			Additional holidays, wages, health and safety	Wages, working conditions, health and safety
LU			All issues	
NL	Wages, labour conditions,			Special arrangements for work/life balance
SK	Wages, work-time, labour relations, work conditions	Wages, work-time, labour relations, work conditions	Wages, work-time, labour relations, work conditions	Wages, work-time, labour relations, work conditions

Source: National correspondents responding to the survey launched by Social employers (2019)

Social partners on national level

Concerning the actors in collective bargaining, the survey shows that social dialogue is generally practised in all countries by employers' and trade union organisations. There is some diversity related to the sector structure. For instance, in the Netherlands, there are two employers' organisations, one mainly representing private not-for-profit organisations, and a smaller one mainly representing private for-profit organisations. In Germany, each service provider (non-profit) has its own employers' organisation (AWO, DRK, Parität). Some national particularities are also observed, for instance in Germany where churches (catholic and protestant) are a huge service provider, they have their own



regulation framework with their own collective bargaining. A tripartite social dialogue is found to exist in countries where a large part of the social services sector is managed by the public sector (SK, LT). For instance, in Slovakia, public entities, such as municipalities and regions, are represented by the Federation of employers' associations of the Slovak Republic, while not-for-profit private organisations¹⁸, members of APSSvSR are represented by The National Union of Employers.

Social partners at EU level

Concerning the affiliation of national employers' organisations to EU employers' organisations, the study shows, based on answers provided by 10 Member States, that national employers' organisations in the social services sector and members of Social employers, are not affiliated to sectoral EU employer's organisations like Hospeem and CEMR. Nexem (FR) is directly affiliated with CEEP and a Belgian organisation is indirectly affiliated with CEEP through its umbrella organisation. According to the on-going representativeness study launched by Eurofound, national trade unions are mainly affiliated with EPSU but also, in the case of the private for-profit sector, with UNI Europa.

Employees' representation on company-level

According to the Sixth European Working Conditions Surveys, 62% of the respondents in the social services sector highlighted that a trade union, a work council or such similar committee exists within their company. This is higher than the EU average for the overall economy (50%). However, there are strong variations between Member states with countries reporting "yes" answers below 30% (CZ, CY, LT, PL) and the top three with over 80% (SE, NO, DK). According to the Spanish correspondent of Social employers (CEAPS), there are many SMEs in Spain, about 95% of the companies have no employees' representation, which would be also the case in the social services sector.

68% of the respondents also noted that they have a health and safety committee or delegate in their company in the social services sector with also important variation between countries, from less than 40% (EE, LT, PT, SK¹⁹, SV) to over 80% (DK, FR, SE, NO).

68% of the respondents explained that a regular meeting in which employees can express their views about what is happening in the organisation exists in their company. The rate is over 80% in four countries (FR, FI, SE, NO) and less than 40% in seven countries (EE, EL, LT, PL, PT, SV, SK).

¹⁸ In Slovakia there are public and non-public organisations providing social services. Both kinds of organisations are not-for-profit. There are only a few (up to 20) for-profit organisations in Slovakia.

¹⁹ In Slovakia every company must contract an external organisation to provide health and safety services and every organisation must nominate a delegate within the company to represent the organisation.



3. Qualification and training

3.1 Qualifications

Applicable collective agreements generally include job classifications. These grids are based on criteria of experience and diploma earned (FR, BE) or typical work characteristics (“Tätigkeitsmerkmale”) (DE), diploma earned, experience and competence (ES), diploma earned, experience and skills (FI) or only diploma (LT). There is no applicable classification issued from a collective agreement in the **Netherlands** and **Luxembourg**. However, in the Netherlands, classifications for nurses are established by law (in an act called *Wet Beroepen Individuele Gezondheidszorg*). In **Slovakia**, the classification is established by law and is based on criteria related to the diploma earned and experience. But the collective agreement sets wages and working time according to the level of qualification and experience.

Minimum qualifications are required to obtain employment in the sector in all countries covered by the study. Access to jobs in the sector is in principle reserved, at least for a majority of positions, for persons with a qualification recognised by the branch collective agreement (BE, FR) and/or the law (BE, CZ, DE, ES, IT, LU, SK). It should be noted that in the **Netherlands**, there are access conditions, set by law, only for nurses.

According to the EWC, a large majority of employees in the social services sector estimate that their present skills correspond well with their duties (53%). 23% estimate they have the skills to cope with more demanding duties. However, **almost a quarter of the workforce reported the need for further training to cope well with their current duties**. One reason could be that tasks are changing (digitalisation, less human interaction...) so that professionals who are qualified, may need further training to adequately cope with the new responsibilities. According to the national correspondent in Germany, this is the case, especially with an ageing workforce, who is not accustomed to using digital tools. Young employees who grew up with technology and do not have the same training needs.

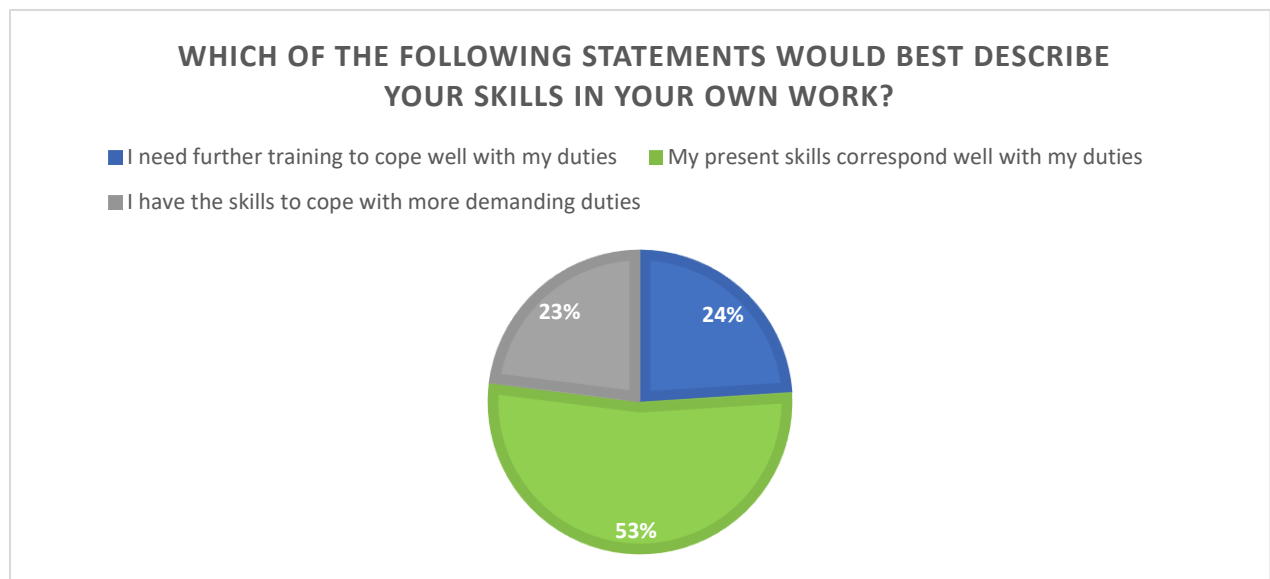
The national correspondent in **Slovakia** provides another reason. The correspondent stresses that due to a significant shortage of personnel in the social services sector, employers often employ personnel with only a basic level of education and insufficient skills. This can explain why employees may declare that they need further training to cope well with their responsibilities. Furthermore, in Slovakia, due to insufficient financing of the social services, providers are often not able to provide their personnel with adequate training.

In **France**, the Social employers’ correspondent recognizes that employees may feel that their jobs will evolve due to changes in practices, whether because of digitalization or because of the evolution of people's support needs (the need for more autonomy, strengthening of self-determination and de-institutionalization). In addition, for managers and directors, new skills are becoming necessary, in terms of human resources, research funding, lobbying, reporting to justify each grant received or to respond to calls for proposals.

Concerning employees in direct contact with the public, they feel their training needs are evolving because the public is also evolving, often precarious, and also more demanding. Trained employees are more so trained to serve the "average" audience rather than the epiphenomena of violence, racism, deviance and complicated situations which are becoming daily occurrences.



Graph 9: Worker's appreciation of their skills in their own work



Source: EUROFOUND (2016), European Working Conditions Survey

3.2 Vocational training

According to the survey sent to the Social employers' national correspondents, in general, employers are not required to organise a minimum number of trainings per year or to finance a minimum number of training hours per year (FR, FI, NL²⁰, DE, ES).

In **France**, employers are required to provide training at least every six years. They also have a general obligation to adapt employees to changes in their employment. Employees have a Personal training account (*Compte personnel de formation* - CPF) that allows people aged 16 or over to acquire training entitlements to be logged in an account which remains valid throughout their working lives²¹. Each employee has received, since January 2019, €500 per year, paid by the employer, into his CPF (with the limit of €5,000). Medical staff have to undertake a specific training every three years to retain their right to pursue their activity (*Développement professionnel continu*, DPC). The objectives of the DPC are to maintain and update knowledge and skills and to improve practices. It is an obligation for all health professionals, regardless of their title or sector of activity. Each health professional must justify, over a period of three years, his commitment to a DPC approach involving actions to analyse, evaluate and improve his practices and risk management. Furthermore, in company with 300 employees or more (or in transnational companies employing 150 employees or more in France), employers have a commitment to negotiate the Jobs and Skills Planning System (*Gestion prévisionnelle des emplois et des compétences*, GPEC) every three years. This GPEC aims to adapt jobs, staff and skills to the requirements resulting from companies' strategies and changes in their economic, social and legal environments.

Furthermore, some legal requirements exist in several countries for the entire private sector and not pertain specifically to social services.

²⁰ Except for nurses.

²¹ Eurofound (2017), [France: Occupational personal accounts take effect](#), 29 May 2017



In **Belgium**, employees enjoy a legal individual right to 2 days of training per year (with the objective defined in sectoral or company agreements to achieve 5 days of training, but without sanction or deadline).

In **Spain**, there is a legal obligation to provide training (20 hours per year, cumulative over five years).

In **Lithuania**, employers must organise at least 16 hours of training per year.

In **Luxembourg**, according to the extended sectoral collective agreement, employers must finance 24 hours of training per year per full-time employee and allow health professionals to be trained to maintain their right to practice, which concerns, for example, nurses or occupational therapists. The same commitment also exists in the **Czech Republic**.

In **Slovakia**, there is no obligation to train social services' employees. The organisation of training depends on the will of the employer and its financial resources. However, the employers must provide training or allow health professionals to be trained to maintain their right to practice. Health professionals must acquire a number of credits (100) within a five-year period.

According to the Social Employers survey, employers are generally not required to contribute to the financing of vocational training by devoting a certain proportion of the pay-roll (BE, DE, LU, SK). However, in **France**, employers are required to spend 1.35% of the wage bill on training with an option to go to 2%. This is a contractual obligation, which goes beyond the legal requirements, at the level of the branch, but which can also be instituted at the level of a company.

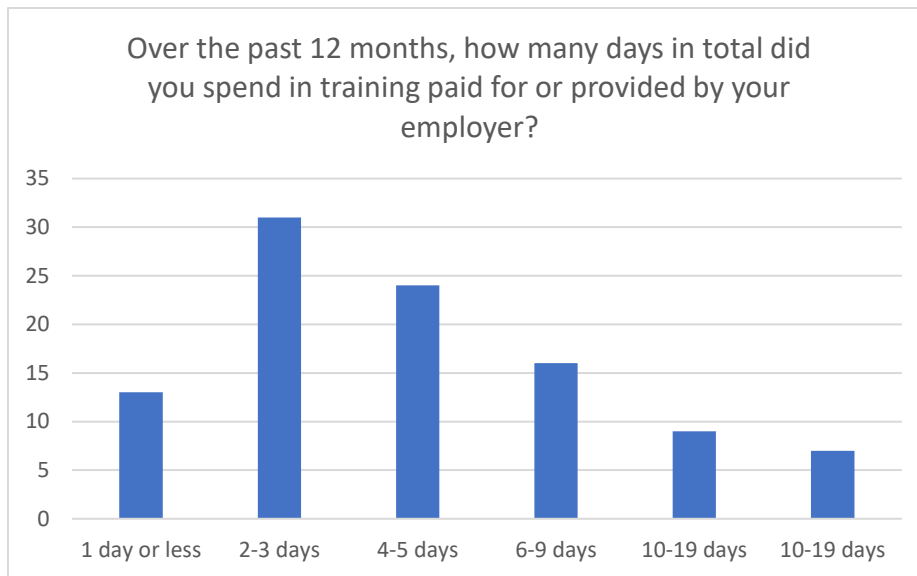
In the **Netherlands**, employers are required by collective agreement to spend 2% of the wage bill on training. In addition, in **Lithuania**, by collective agreement, the employer must devote 30 working days to training (compared to 20 hours in other sectors). In Finland, employers have a legal requirement to spend a proportion of the pay-roll to finance vocational training.

Finally, all employers' organisations who responded to the Social Employers survey believed that the current budget available for vocational training is too low. Furthermore, excluding **France**, where all companies are incentivized to create a training plan (*Plan de développement des compétences*) European countries do not obligate training plans, though in some of them such practices exist at the company-level (NL, LT, LU).

In the framework of the European Working Conditions Survey, one question was how many days in total the workers spent, over the past 12 months, in training paid for or provided by their employer. Over 30% reported spending 2-3 days in such training and almost a quarter reported spending 4-5 days. Only 13% of the interviewees had spent one day of training or less over the past 12 months. In comparison, on the EU level, a majority of interviewees reported that they haven't spent any days of remunerated training over the past 12 months (62%).

Graph 10: Participation in training, paid for by the employer





Source: EUROFOUND (2016), European Working Conditions Survey

3.3 Digital skills

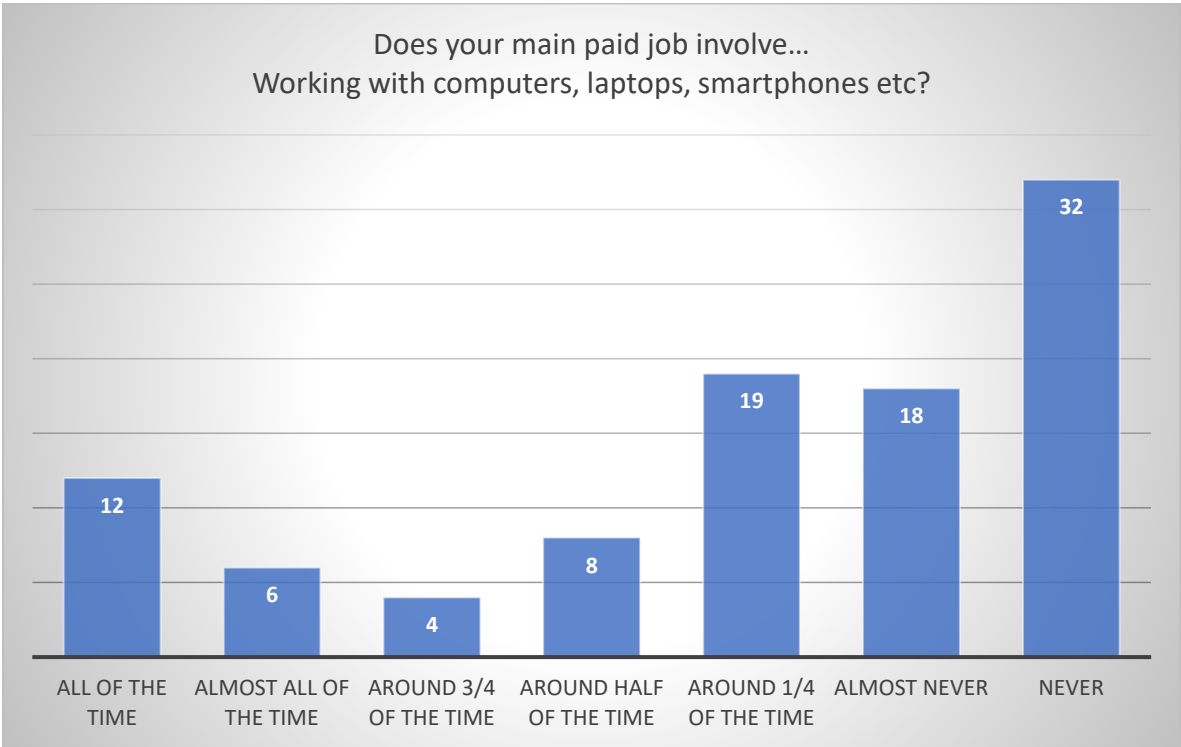
In the whole economy, **43% of the workforce never (or almost never) works with a computer, laptop, smartphone, etc.** The rate is higher in the social services sector (50%). One reason could be that for the social services activities, the need for such tools is not as great, so employees are not required to use them (FR, ES). The distinction should be made between the different activities of the social services. For instance, in **France**, digitalisation is used in the early childhood and animation sectors, for reporting and institutional communication. Furthermore, in some countries, as in **Germany, France** or **Netherlands**, the use of smartphone apps in home care activities (e.g. for documentation) for the elderly is very common. In other social activities technology is not very common but its use is increasing. Documentation is getting more and more digitalised in every field of social work.

On the contrary, in **Slovakia**, there is very little digitalisation in this sector. Everything is still done on paper, as providers are often not able to offer their personnel training on digital tools and also because the education and skill level of employees, as well as their age, means they are not proficient enough to use a smartphone, tablet or computer for work.

31% of the workforce works with a computer, laptop or smartphone and this constitutes between $\frac{1}{4}$ and $\frac{3}{4}$ of their working time (compared to 25% in the wider economy).



Graph 11: Share of workers who work with computers, laptops, smartphones etc?



Source: EUROFOUND (2016), European Working Conditions Survey

In all the countries that participated in the Social Employers study, national correspondents reported that employees use information and communication technology for their daily tasks. Furthermore, they estimate that their use of these tools will increase in the coming years. Digitalisation is being used in the management of cared person’s files in order to reduce administrative tasks (ES, DE, NL, LT, SK) and the management of services (LT). A particular difficulty concerning access to software should be noted: in **Slovakia**, the Social Employers national correspondent highlights that the language barrier prevents staff from using some digital tools developed in English or German. Also, when institutions use a tool, they will use software developed by a Czech company (Cygnus). Otherwise, a majority of respondents highlighted that employees are trained to use digital tools (BE, FI, NL). No specific training has been reported yet in some countries (BE, FR, LT).



4. Working conditions

4.1 Working time

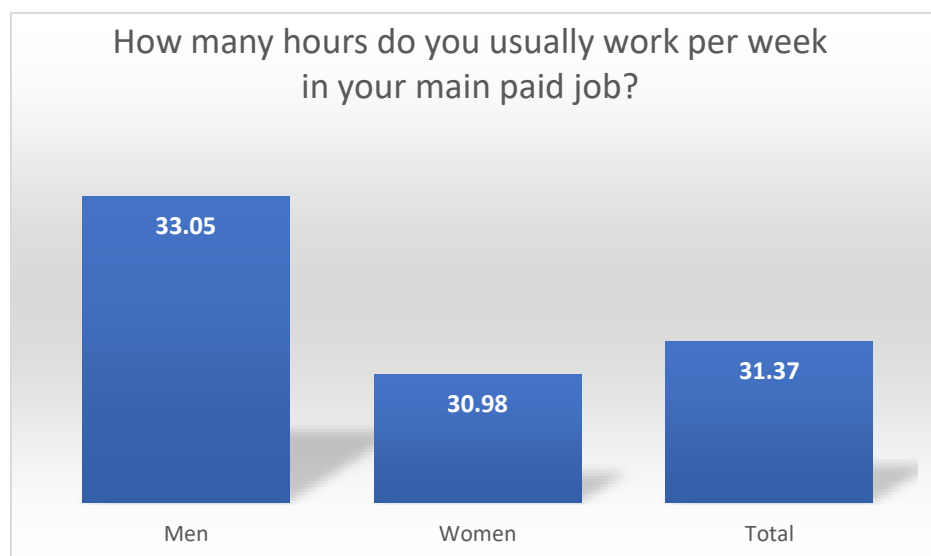
Weekly working time

As highlighted by the Social Employers survey, there is great diversity regarding the legal working time between the different countries, from 35 hours per week in France to 40 hours in **Luxembourg** and **Lithuania**. In some countries, some variation may exist²² through collective agreement as in **France** where the weekly working time can be extended to more than 35 hours per company-level agreement and individual agreement ('forfait-jours').

In **Germany**, the average working time is 39 hours but depending on the collective agreement, the weekly working time is in general between 38.5 hours to 40 hours. In **Lithuania**, the weekly working time is 40 hours, but is reduced to 38 hours for medical staff.

According to the European Working Conditions Survey, **on average, workers in the social services sector work about 31,37 hours per week in their main paid job**. On the EU level, for the entire economy, the rate of workers working less than 35 hours a week is 28% while 49% work between 35 and 40 hours. On average, the working time of social services' employees is lower than what is found in the overall economy.

Graph 12: Number of hours usually work per week on the main paid job



Source: EUROFOUND (2016), European Working Conditions Survey

The main contributor to the low average working time is the importance of part-time work in the sector. For instance, according to the survey launched by Social Employers, part-time workers represent over 2/3 of the social services workforce in **Germany**²³ and in the **Netherlands** (two of the largest

²² Variation exists also for the annual working time from 1,589 hours (FR) to 2,000 (SK) and 2,001 (LT).

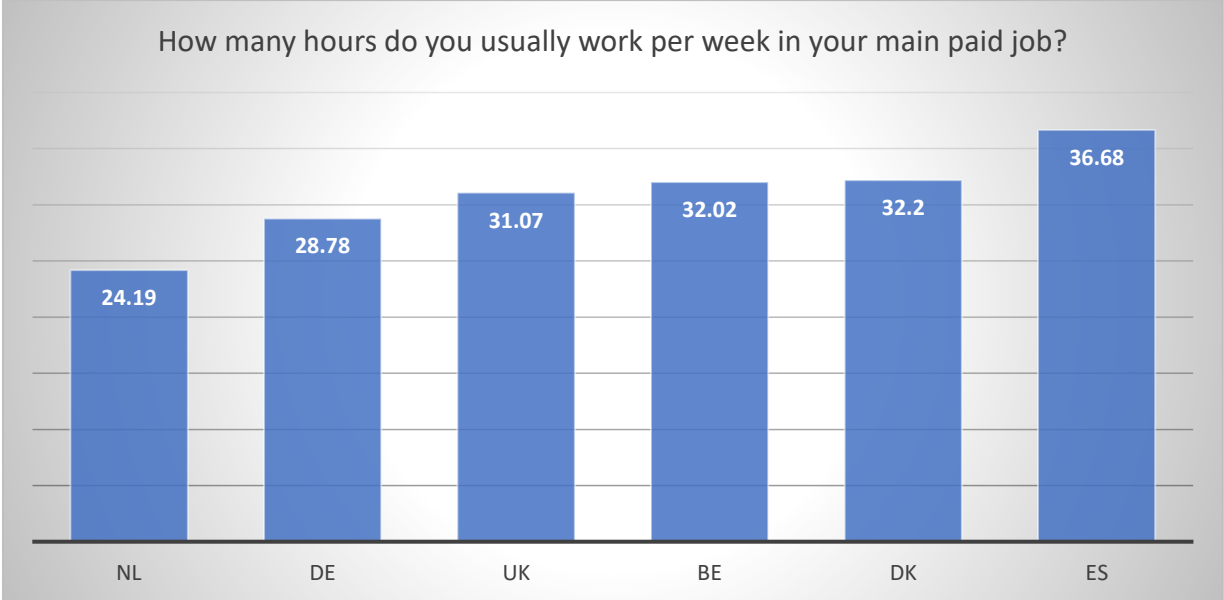
²³ According to national statistics, the part-time rate reaches 58.5% in Nace code 87 and 45.54% in Nace code 88. Statistik der Bundesagentur für Arbeit. Tabellen, Beschäftigte nach Wirtschaftszweigen (WZ 2008) (Quartalszahlen), Nürnberg, März 2019. <http://statistik.arbeitsagentur.de/Navigation/Statistik/Statistik-nach-Themen/Statistik-nach-Themen-Nav.html>



countries in terms of the social services workforce). In Spain, about one third of the workforce works part-time and the rate reaches 40% in **Luxembourg**, in the human health and social action activities. The rate is below one-third in **France** (23%), **Finland**, **Lithuania** and **Slovakia**. It must be noted that in **France**, a sectoral collective agreement in social services was reached which aims to reduce the rate of part-time work to fight precariousness and/or in-work poverty by offering more full-time positions. Whereas in the **Netherlands**, practices and collective agreements are being recorded to increase the rate of part-time employees with the aim of addressing the labour shortage. In **Finland**, employers are obligated by law, to offer full time positions if possible.

Average working time for workers in the social services sector is given below for the countries where the data from the European Working Conditions Survey are found to be the most reliable due to adequate response numbers. It shows the low level of average working time in the Netherlands, as the part-time work rate there is the highest in the EU.

Graph 13: Usual working time per week

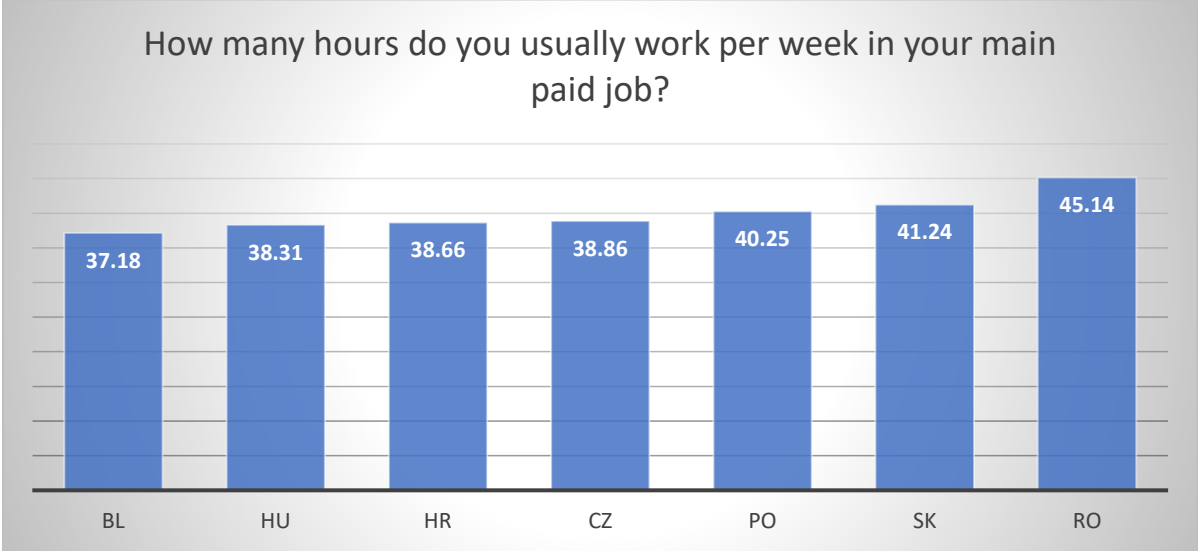


Source: EUROFOUND (2016), European Working Conditions Survey`



The graph below focuses on the countries with the highest average working time. These data should be viewed with caution, due to the low sample size. These national level data show that the highest average weekly working hours are found in new Member States.

Graph 14: Usual working time per week in countries with the highest levels of weekly working time

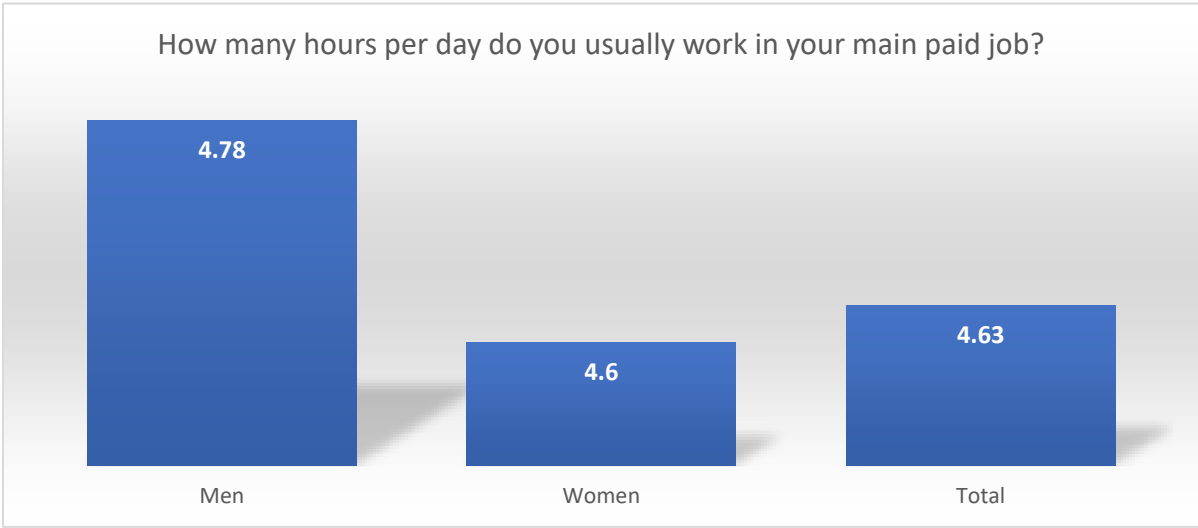


Source: EUROFOUND (2016), European Working Conditions Survey

Daily working time

According to the European Working Conditions Survey, on average, workers in the social services sector work about 4.63 hours per day in their main paid job, with a slightly difference between men (4.78 h) and women (4.6 h).

Graph 15: Usual working hours per day



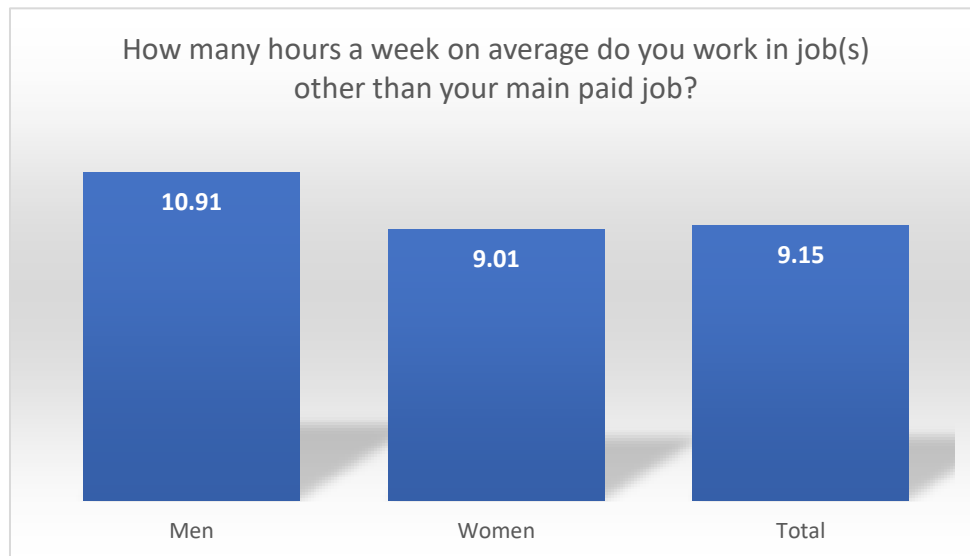
Source: EUROFOUND (2016), European Working Conditions Survey



Second job working time

According to the European Working Conditions Survey, workers in the social services sector who have an additional job on top of their main paid position, spend on average about 9.15 hours per week working at their second job. This figure is higher for men (10.91) than for women (9.01).

Graph 16: Number of hours per week spent working at second job



Source: EUROFOUND (2016), European Working Conditions Survey

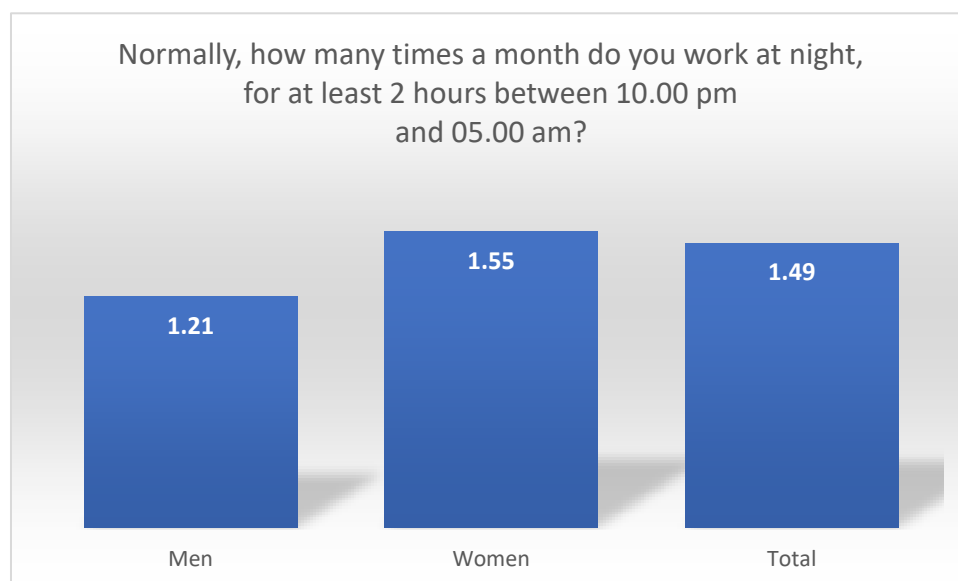
Night work

In the EU, according to the European Working Conditions Survey, 19% of the workforce works at night at least once a month. In the social services sector, the employees work on average 1.49 times per month at night, for at least 2 hours between 10.00 pm and 05.00 am. According to the Social Employers survey, night work is an important practice in residential care activities which provide continuous service. However, the proportion of employees in all activities where night work is involved is relatively low, particularly in **France** (1.3% of the employees²⁴); though some countries, such as the **Netherlands**, report that more than 30% of employees work at night. In all the countries surveyed, the share of night workers seems fairly stable (ES, DE, LU, NL, SK), except in **France** where the rate increased by 9% between 2012 and 2017 and in Lithuania where the number of employees working at night is expected to increase in the coming years. One limitation to night work is that employers are required to pay employees the compulsory compensation for night work (SK).

²⁴In France, it may be due to the fact that since 2015, night shifts normally performed by social workers have been replaced by specialised workers who only work at night (*“surveillants de nuit qualifiés”*)



Graph 17: Number of hours worked at night



Source: EUROFOUND (2016), European Working Conditions Survey

According to the Social employers' survey, night work is often regulated by sectoral collective agreements (BE, ES, DE, FR, FI) which include limits, night work bonuses and overtime rest hours. In the **Netherlands**, night hours are paid from +44% to %60% more than normal working time and nightshifts are a requirement for every employee under 55 years. The rate reaches +40% in **Finland**, while in **Lithuania**, night hours must be paid 1.5 times more than the usual hourly rate. In **Spain** and **Luxembourg**, the collective agreement provides the same compensation as that fixed by law. In other countries, employees in the sector are simply covered by the legal provisions on night work, which also provide for this type of compensation (LT, SK).

Standby shifts

The practice of standby shifts, where the employee must remain reachable at all times, whether at home or in a place of their choice, is important in **France**, especially for managers. It is used at the rate of a maximum of one week out of two in return for a financial compensation of €373 per week. It is also regularly practiced in **Belgium**, in sectors where there is accommodation and in **Germany**, for home care activities for the elderly. This practice is also common in **Finland** and **Luxembourg** where specific provisions exist in the sectoral collective agreement for employees aged 50 and over. Three countries consider this practice not to be important (LT, ES, SK). The Social employers' national correspondent for **Slovakia** points out that this is linked to the fact that employers do not have the resources to finance standby time.



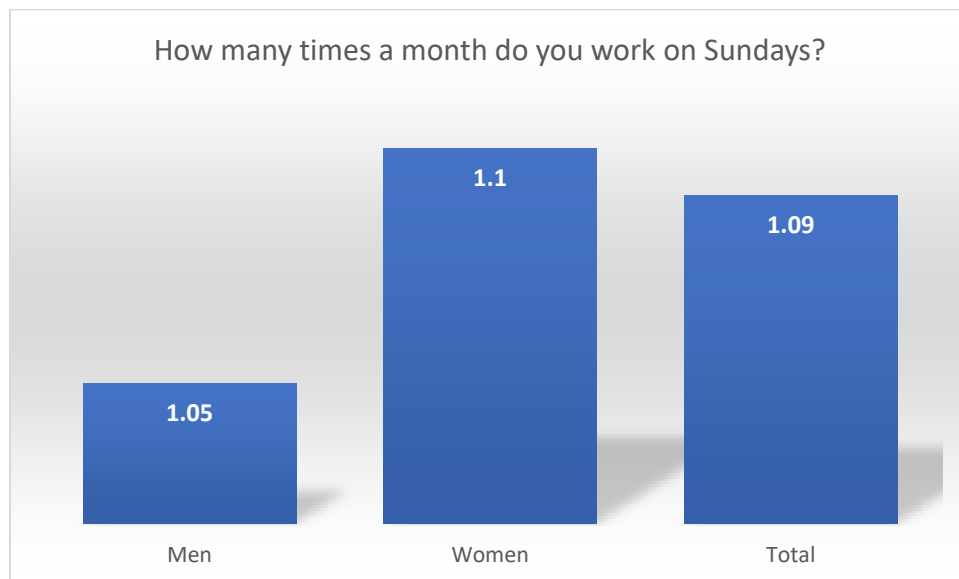
On-call work

The practice of on-call work, when employees stay at the social services' premises (workplace) and will intervene if necessary, is considered important in several countries (BE, specifically in-home care for the elderly; FI, NL, but limited to 24 hours; LU; LT). In **Lithuania**, with the increase in home care services, this practice is becoming increasingly important. On the other hand, it is not considered to be important in **Slovakia, Spain** and **France** where it is no longer widespread since a case in the EU Court of Justice qualified these periods as effective working time. In **Germany**, on-call work (*Arbeit auf Abruf*) plays quite a minor role due to strict compensation obligations.

Weekend Work

In the EU, according to the European Working Conditions Survey, 54% of the workforce works during one or more weekend per month. In the social services sector, employees work on average 1.09 Sunday per month and 1.24 Saturday per month. Female employees work on weekends more often than male employees at 1.1 times per month in comparison to 1.05. We predict the reason behind this is that female employees are over-represented in the social services activities where caregivers are needed all the time, including on Sundays. As the Social employers' correspondent in **Slovakia** explains, the sector there is highly female dominated. Men are usually found in management or more specialised positions, and therefore do not work on weekends.

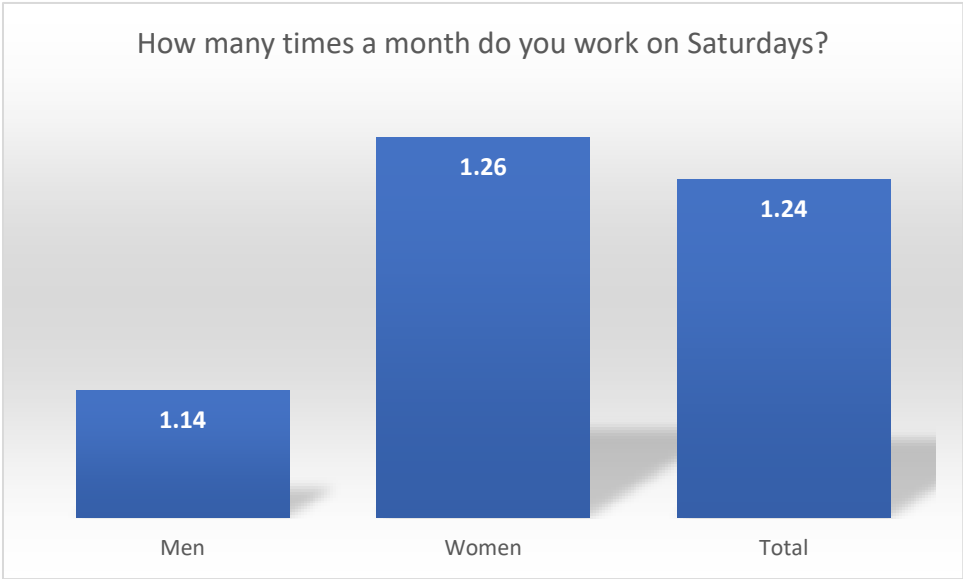
Graph 18: Number of Sundays worked per month, with gender breakdown



Source: EUROFOUND (2016), European Working Conditions Survey



Graph 19: Number of Saturdays worked per month, with gender breakdown



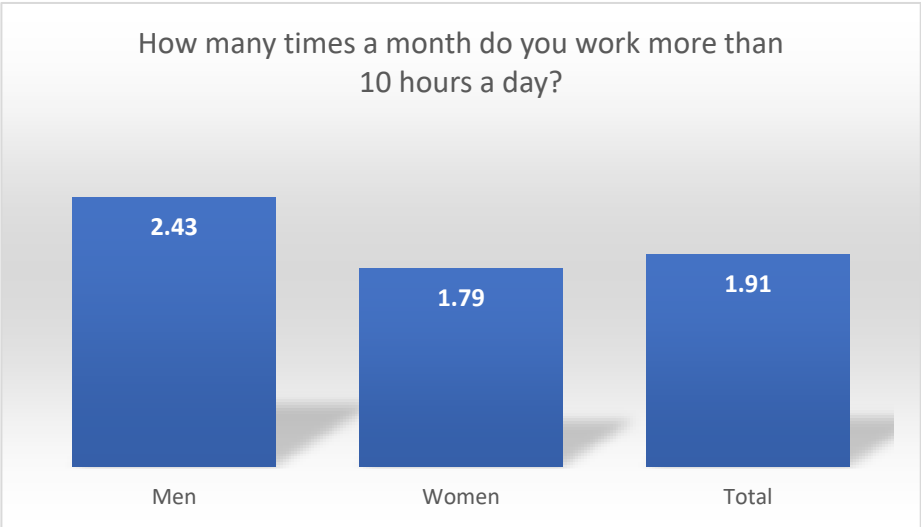
Source: EUROFOUND (2016), European Working Conditions Survey

Extended working hours

In the EU, according to the European Working Conditions Survey, 32% of employees work 10+ hour days at least once a month. In the social services sector, the workforce works on average 1.91 10+ hour days per month, with an important difference between men (2.43) and women (1.79), which may be related to the significant number of women in part-time positions. These long working hours may be explained by individuals working on weekends, when employees often work 12 hours shifts (FR). In **Slovakia**, an important reason is the workforce shortage. Employees work either 8 hours shifts (3 in 24 hours care) or 12 hours shifts (2 in 24-hour care). Decisions regarding lengths of shifts are made by employers. When there is a lack of personnel, 12 hours shifts are favoured. This helps to explain why employees reported experiencing long working hours. In **Spain**, at least in this sector, the longest working shifts usually happen at night, where the average shift lasts 10 hours.



Graph 20: Number of days per month where workers' shifts were over 10 hours, with gender breakdown

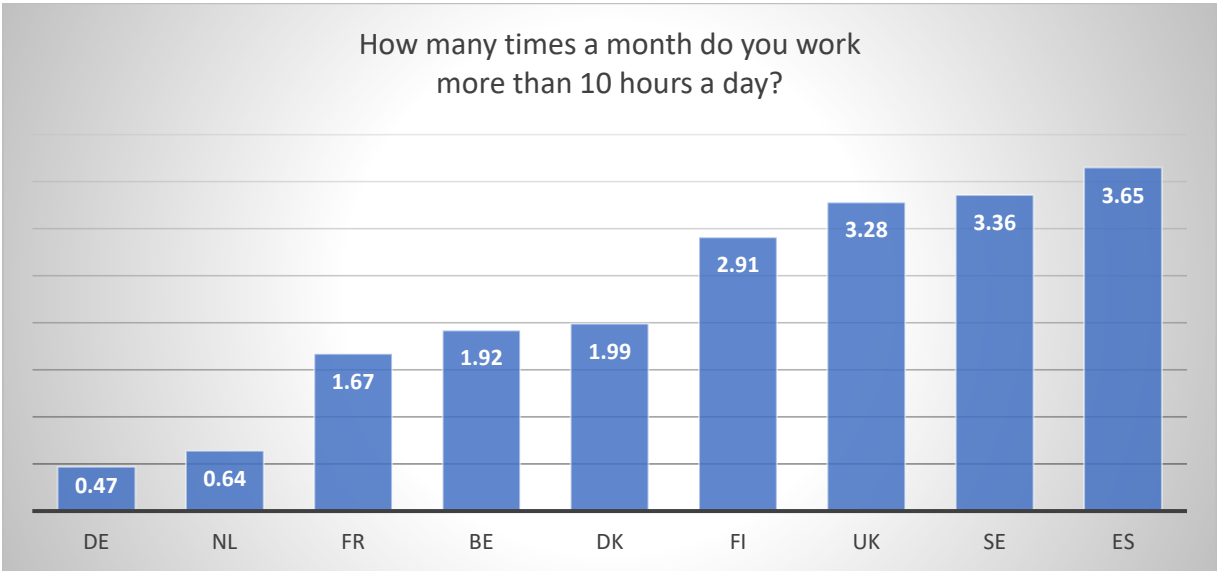


Source: EUROFOUND (2016), European Working Conditions Survey

The national data stress important differences between countries, with some reporting figures higher than the EU average (ES, FI, SE, UK) and others far below (NL) mainly because restrictions enforced by law (DE). The highest rates (more than 4 extended days per month) are found in EE, IE, MT, PL, HR.

In **Slovakia**, 12 hours shifts are quite common in the social services sector. Employees are not allowed to work shifts that are longer than 12 hours (by law). Therefore, employees work 12 hours shifts or regular 8 hours shifts.

Graph 21: Number of days par month where the workers' shifts were over 10 hours, by country



Source: EUROFOUND (2016), European Working Conditions Survey

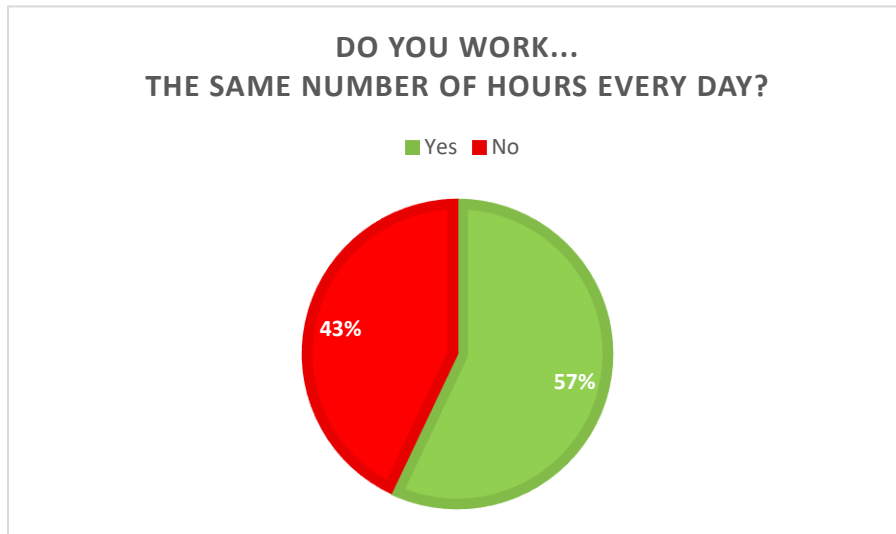


4.2 Work life balance

Working time predictability²⁵

In the EU, according to the European Working Conditions Survey, 56% of the workforce works the same number of hours every day. In the social services sector, the average is similar with 57% of the workforce working the same number of hours each day.

Graph 22: Share of workers working the same number of hours every day



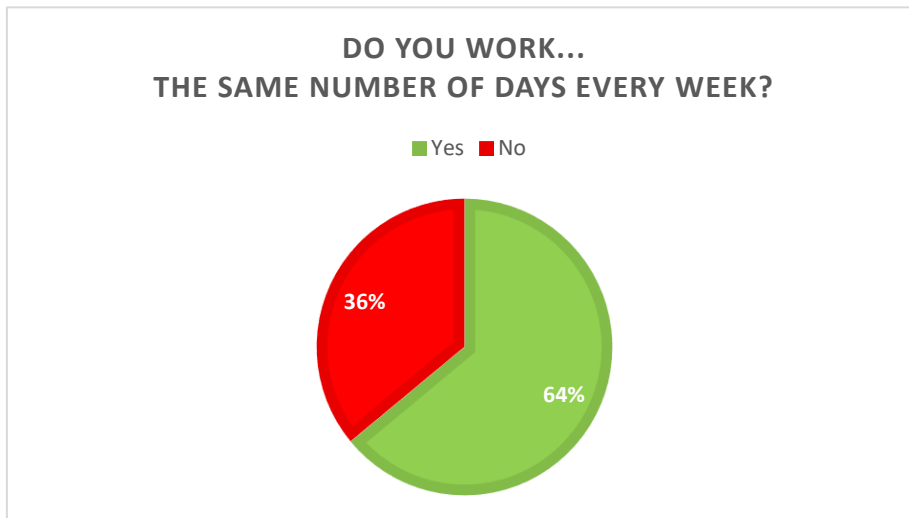
Source: EUROFOUND (2016), European Working Conditions Survey

In the EU, according to the European Working Conditions Survey, 63% of the workforce works the same number of days each week. In the social services sector, the average is also similar with 64% of the workforce working the same number of days each week.

²⁵ The sector will have to adapt to the requirements of the new EU directive on predictable and transparent working condition which will be transposed in national legislation in the next two years.



Graph 23: Share of workers working the same number of days each week

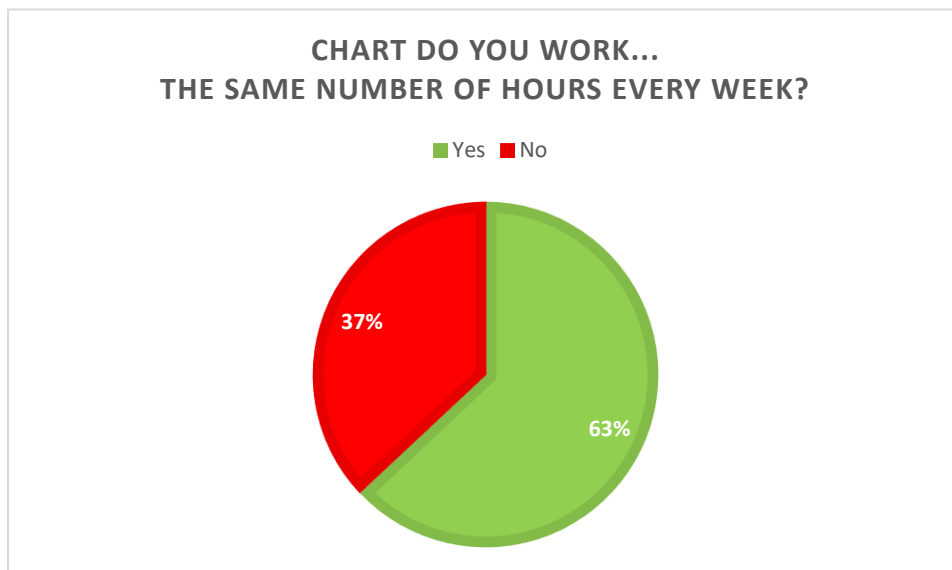


Source: EUROFOUND

(2016), European Working Conditions Survey

In the EU, according to the European Working Conditions Survey, 63% of the workforce works the same number of hours each week. In the social services sector, the average is the same.

Graph 24: Share of workers working the same number of hours every week

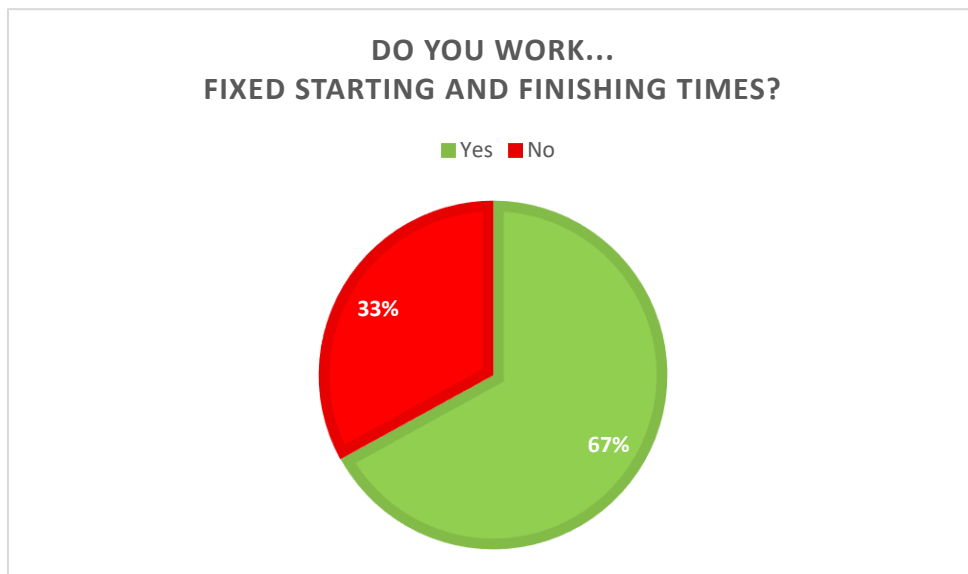


Source: EUROFOUND (2016), European Working Conditions Survey

In the EU, according to the European Working Conditions Survey, 61% of the workforce has a fixed start and finish time at work. The rate is higher in the social services sector at 63%.



Graph 25: Share of workers who have a fixed start and finish time in the social services sector

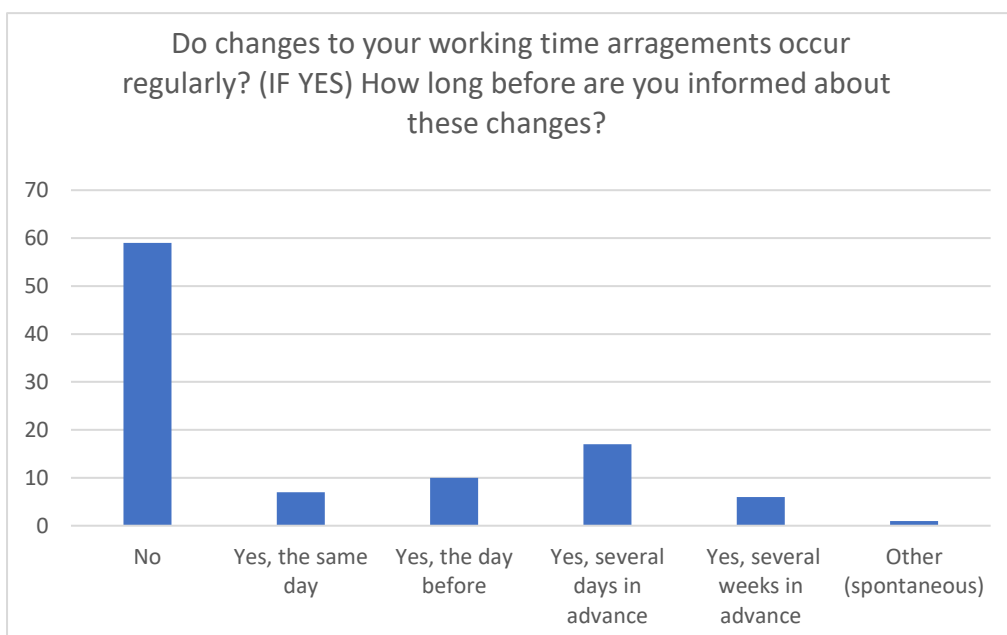


Source: EUROFOUND (2016), European Working Conditions Survey

Working time flexibility

In the EU, according to the European Working Conditions Survey, 61% of the workforce never experiences changes to their working time arrangements on short notice. The rate is slightly lower in the social services sector (59%). When changes occur, it is usually several days in advance (17%) but also sometimes occurs the day before for 10% of the workers or the **day of for 7% of employees (which is significantly higher than the EU average of less than 1%)**. **Short notice changes seem to be more common in the social service sector than in the wider economy.**

Graph 26: Share of workers facing changes to their working time arrangements



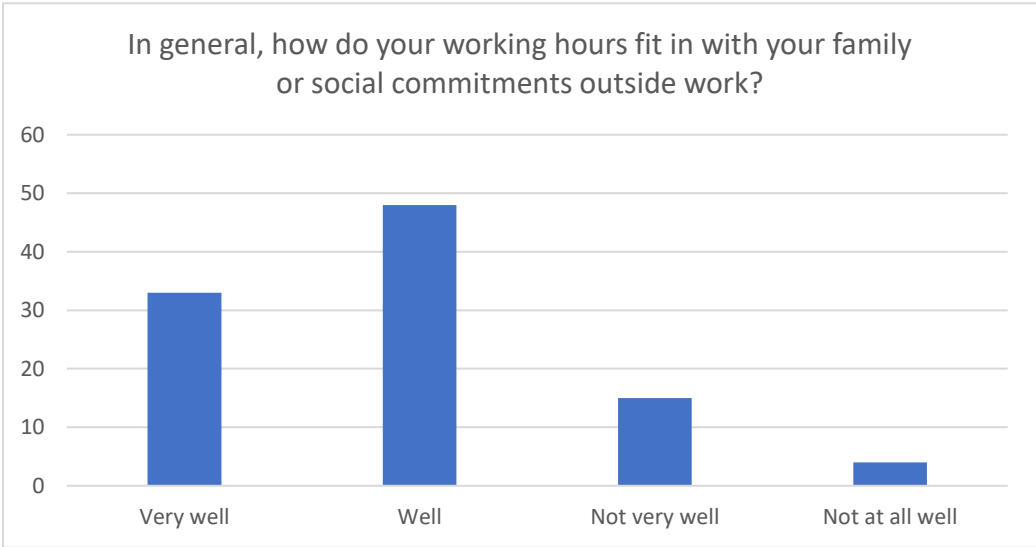
Source: EUROFOUND (2016), European Working Conditions Survey



Work-life balance

In the EU, according to the European Working Conditions Survey, a large part of the workforce feels that their working hours fit well (54%) or very well (28%) with their family and/or social commitments outside of work. 18% feel their working hours do not fit very well (15%) or very well at all (3%) with their outside commitments. The rates are found to be quite similar in the social services sector. The main difference relates to the workers feeling that their working hours fall into the “fit very well” category: this rate is higher in the social services sector (33% as opposed to 28% in the entire economy). However, **48% of workers in this sector feel that their working hours fit “well” which is 7 points less than the EU average.**

Graph 27: Working hours and family and social commitments outside of work in the social services sector



Source: EUROFOUND (2016), European Working Conditions Survey

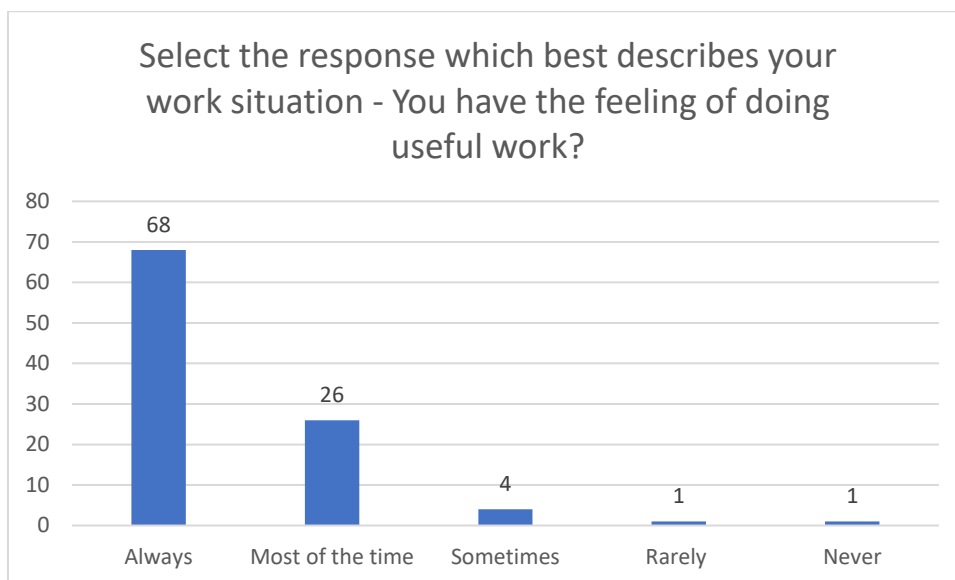


4.3 Psychological risks

In the EU, according to the European Working Conditions Survey, **a large part of the workforce feels that they have enough time to get their job done. 73% reported that they always or most of the time have enough time to complete their responsibilities.** In the social services sector, this rate falls to 66%. About 20% of respondents estimated that they sometimes do not have enough time (compared to 11% for the broader economy), while 11% felt that they rarely have enough time or never have enough time (4% compared to 5% in economy as a whole). **Compared to the broader EU economy, twice as many social services workers reported feeling that they do not have enough time to complete their work.**

Time management

Graph 28: Share of workers who feel that they are doing useful work



Source: EUROFOUND (2016), European Working Conditions Survey

Feeling that work is useful

In the EU, according to the European Working Conditions Survey, a large part of the workforce (85%) feels that they always or most of the time are doing useful work. The rate is higher in the social services sector (94%) (see Graph 28).

This result is not a surprise for some of the Social employers' national correspondents (DE, ES, NL) who thought the rate should be higher than the EU average.

Stress



According to the European Working Conditions Survey, nearly a third of the workforce in social services reports experiencing stress at work (compared to 27% for the broader economy) and 43% report experiencing stress sometimes (compared to 40% for the broader economy). Only a quarter of the workforce feels that they rarely or never experience a stressful situation at work.

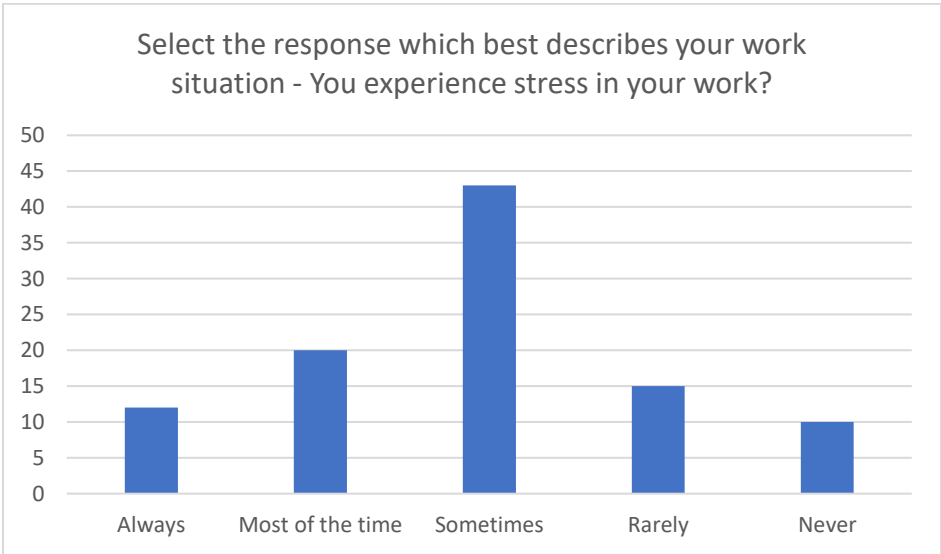
In **Slovakia**, the Social employers’ correspondent highlights that working with certain groups can be stressful, as they are not the easiest clients to care for. Furthermore, the low wages and shortage of staff can also lead to stress as the longer hours, higher client load and more responsibilities add additional pressure to existing employees.

In the **Netherlands**, according to the national correspondent, recent research shows that work-related stress has increased due to poor staffing, the amount of red tape, the lack of autonomy in organising workload and an unhealthy work-life balance.

In **Spain**, the national correspondent estimates that stressful situations stem from the need for 24 hours a day, 7 day a week service coverage and the importance of the labour cost factor in personal services, which leads to over-rationalisation by companies and low wages.

Difficult working conditions are also highlighted in **France**. The fact that employees are confronted with difficult situations, are exposed to death in certain services, are faced with a lack of prospects for improving the conditions of some of the people they care for, and risk making mistakes which can have a significant impact on the life of the person receiving care. In addition, under-staffing in some activities may reinforce the difficulties for workers to do their job well. Due to budget cuts, some organisations may give employees less and less time to do their work.

Graph 29: Share of workers who report experiencing stress in their work



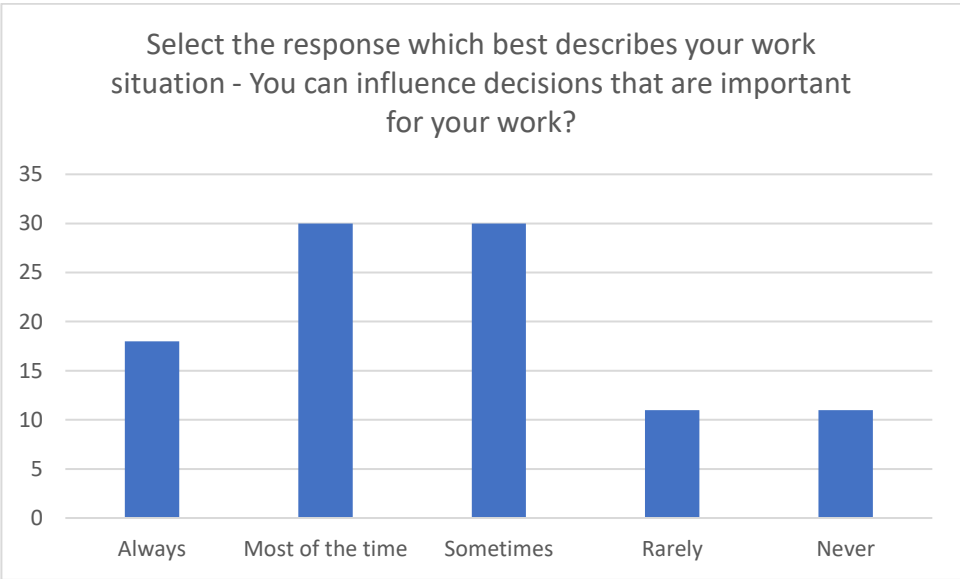
Source: EUROFOUND (2016), European Working Conditions Survey



Influence on decision-making

When asked 'Can you influence decisions that are important for your work?', 47% of the workforce for the overall economy answered 'always or most of the time'. In the social services field, the rate was similar at 48%. The social services workforce was more likely to feel that they are able to influence decisions sometimes (30%) in comparison to the workforce of the economy as a whole (26%). And 22% of social services workers estimated that they have rarely or never influence decision-making, compared to 27% in the wider economy

Graph 30: Share of workers who report having influence on decision-making that is important for their work



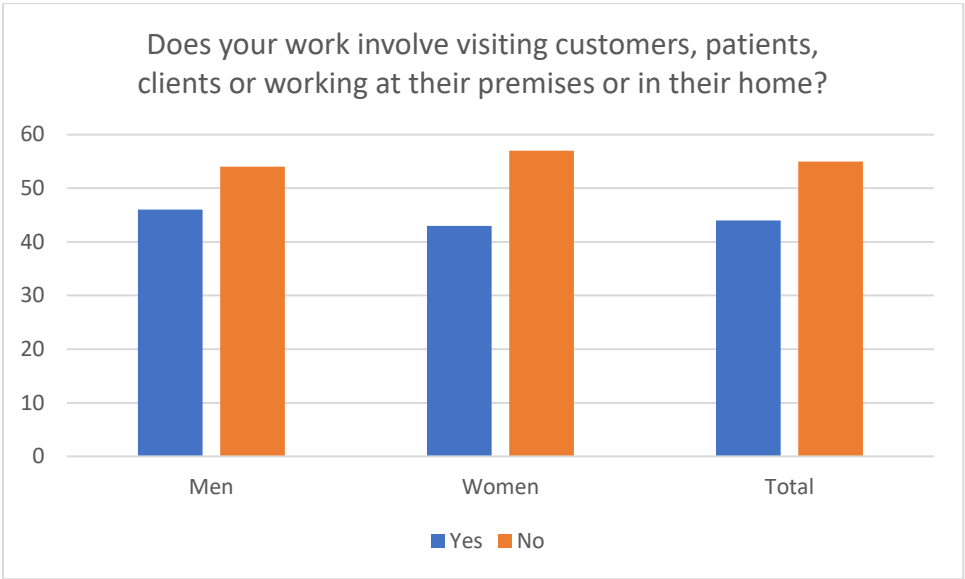
Source: EUROFOUND (2016), European Working Conditions Survey

Visiting third-parties and work done outside of the employers' premises

According to the European Working Conditions Survey, 70% of the EU workforce does not visit customers, patients or clients at their place of work or home. In the social services sector, the situation is very different, with the rate down by 15% to 55%. A total of 44% of workers visit customers, patients or clients at their place of work or home compared to 30% in the wider economy.



Graph 31: Share of workers who visit customers, patients, clients at their place of work or home

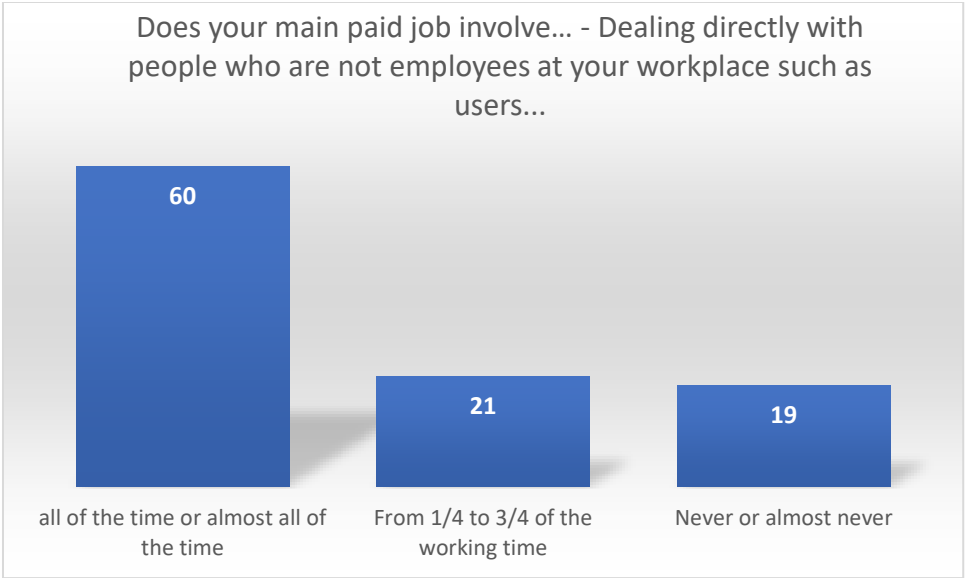


Source: EUROFOUND (2016), European Working Conditions Survey

Dealing with third-parties

According to the European Working Conditions Survey, in the social services sector, 60% of the workforce has to deal directly with people who are not employees at their workplace such as users or passenger (compared to 42% for the wider economy).

Graph 32: Share of workers who have to deal directly with people who are not employees at their workplace such as users, customers, passengers...

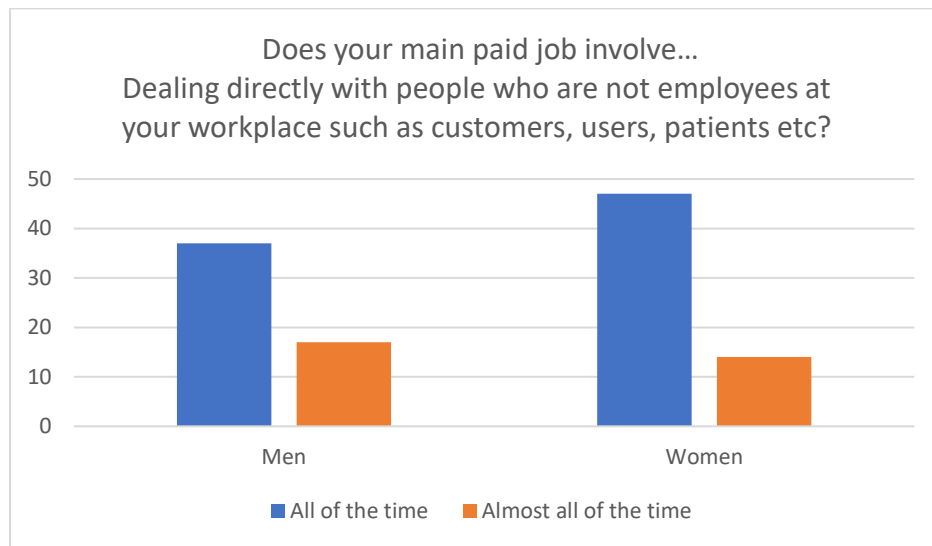


Source: EUROFOUND (2016), European Working Conditions Survey

The gender breakdown shows that female employees are more exposed to dealing directly with people who are not employees at their workplace (such as customers or users) than men.



Graph 33: Share of workers who have to deal directly all of the time or almost all of the time with people who are not employees at their workplace, gender breakdown

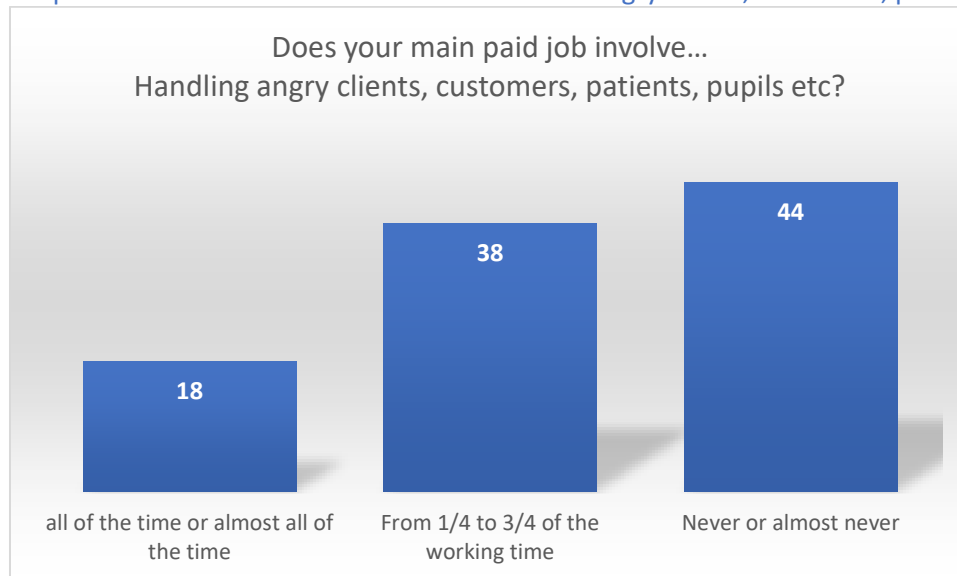


Source: EUROFOUND (2016), European Working Conditions Survey

Dealing with angry third-parties

In the entire economy, 63% of the workforce never (or almost never) has to handle angry clients, customers, patients, pupils... This rate is lower in the social services sector (46%). 35% of the workforce faces such a situation between ¼ and ¾ of their working time (compared to 25% in the whole economy).

Graph 34: Share of workers who have to handle angry clients, customers, patients, pupils...



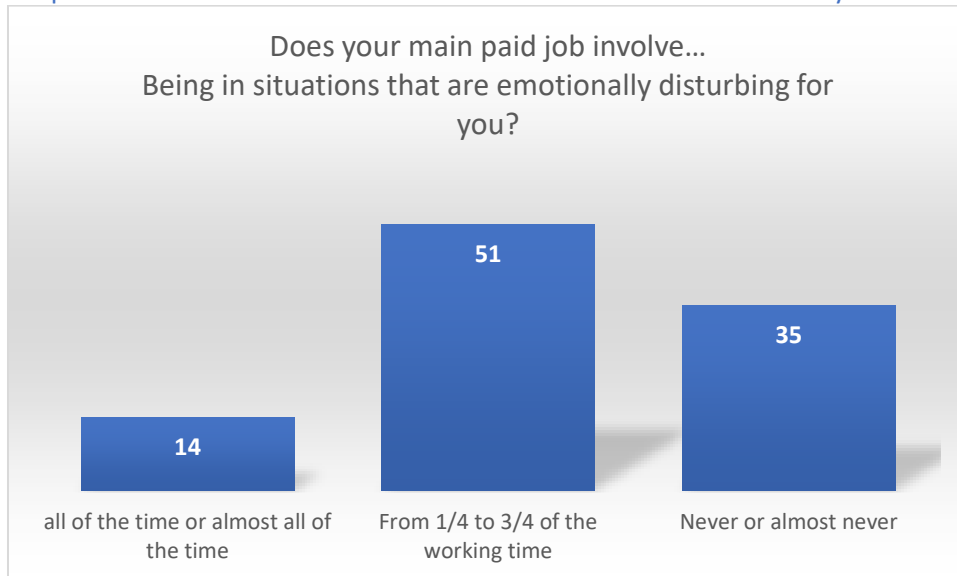
Source: EUROFOUND (2016), European Working Conditions Survey

Emotionally disturbing situations

In the economy as a whole, **70% of the workforce has never (or almost never) been involved in situations that are emotionally disturbing for them. The rate is of course lower in the social services sector (35%). 51% of the workforce faces such situation between ¼ and ¾ of their working time (compared to 25% in the wider economy).**



Graph 35: Share of workers who are in situations that are emotionally disturbing for them



Source: EUROFOUND (2016), European Working Conditions Survey

4.5 Physical risks

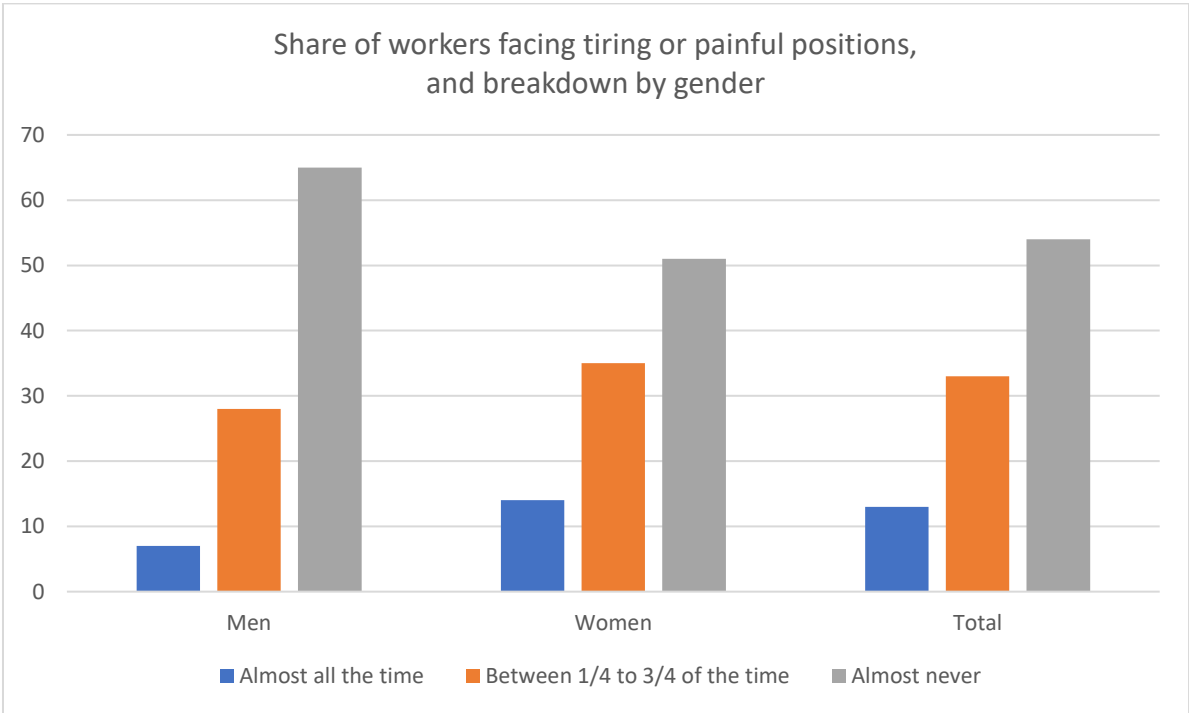
Tiring or painful positions

According to the European Working Conditions Survey, 13% of the employees in the social services sector experience tiring or painful positions all the time, or almost all the time (the rate is the same in the broader economy). 33% face tiring or painful positions between $\frac{1}{4}$ and $\frac{3}{4}$ of the time (30% in the broader economy) while 54% feel that they have never or almost never experienced a tiring or painful position (57% in the broader economy).

Interestingly, **women are more exposed to tiring or painful positions, than men**. Though these data must be taken with caution due to the sample size, national level data shows significant variations between countries. For instance, 57% of the employees in the Netherlands never or almost never are in a tiring or painful position at work while the share decreased to 34% in Spain. In Germany and Netherlands, the exposure to painful positions seems lower than in France or Poland.



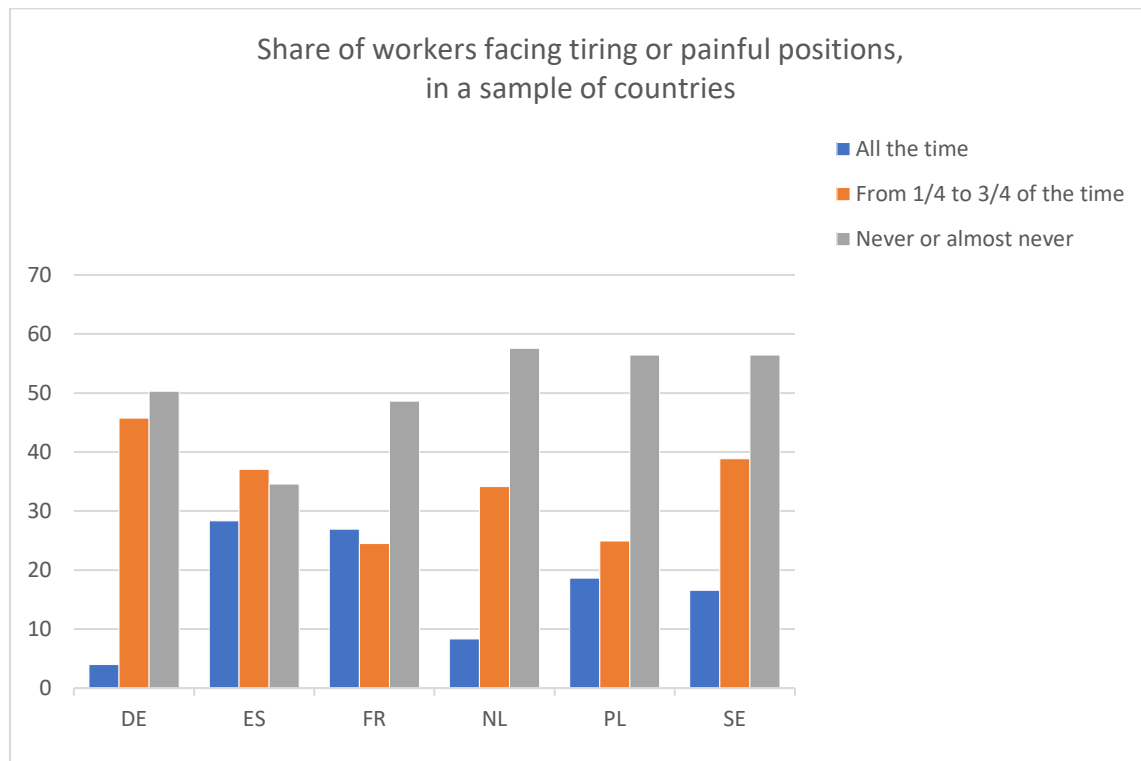
Graph 36: Share of workers facing tiring or painful positions, and breakdown by gender



Source: EUROFOUND (2016), European Working Conditions Survey



Graph 37: Share of workers facing tiring or painful positions, in a sample of countries



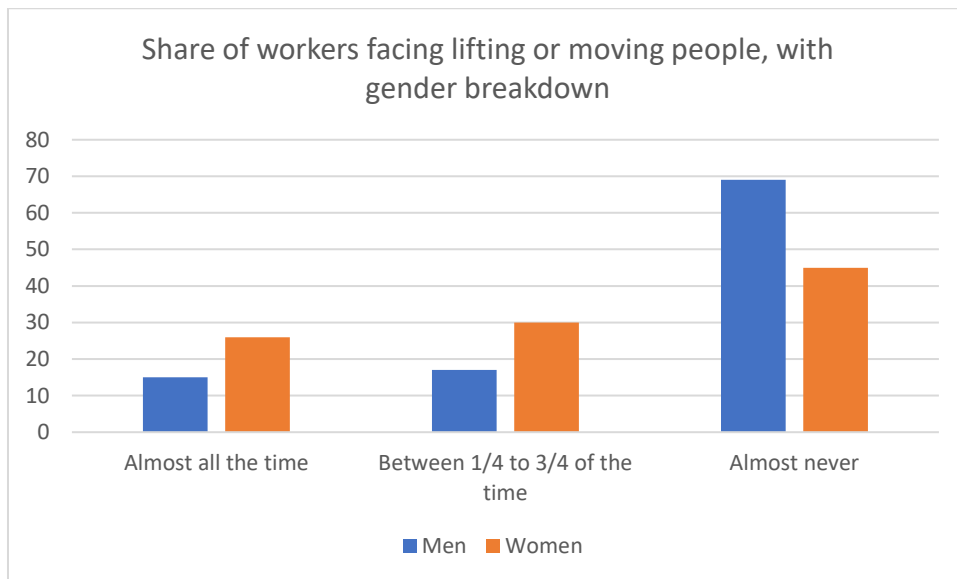
Source: EUROFOUND (2016), European Working Conditions Survey

Lifting or moving people

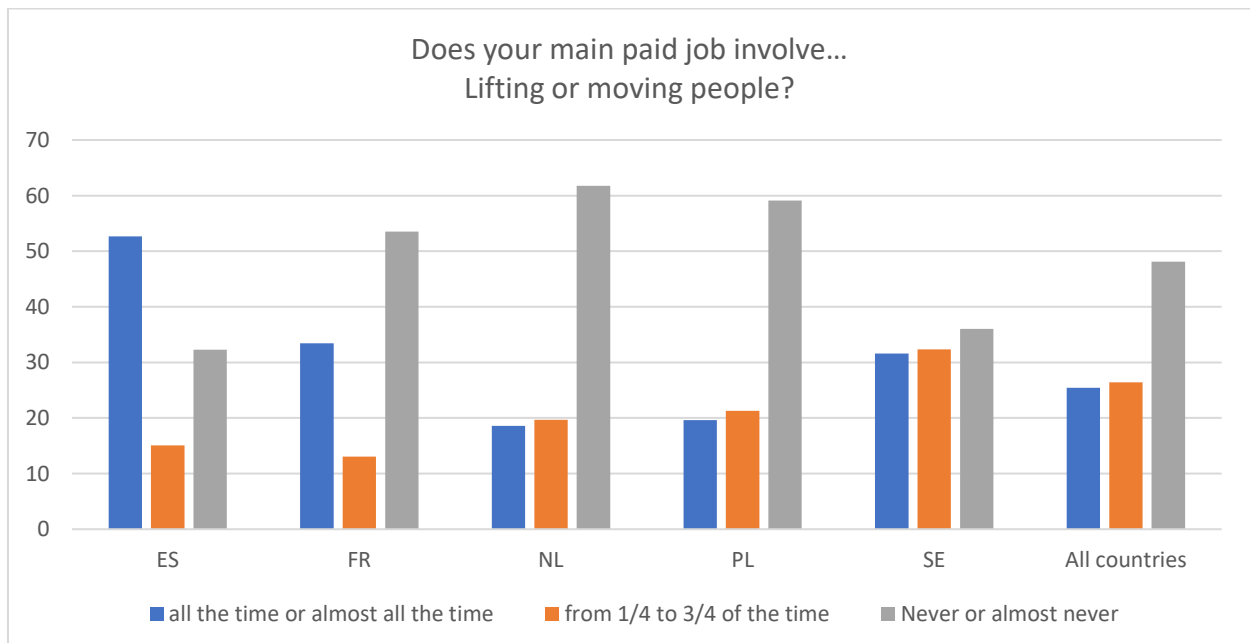
According to the European Working Conditions Survey in the social services sector, **almost the half of the employees (48%) never (35%) or less than ¼ of their working time (13%) have to lift or to move people. A third of the workforce in the social services sector frequently has to lift or move people (33%)** including 15% all the time and 11% almost all the time. Important variation exists between the countries, with some, such as France or Spain, having a large share of people lifting or moving all the time (37% in Spain, 28% in France) and some other countries with almost a majority of employees never having to do this (49% in Poland, 45% in the Netherlands, 42% in France). Once again, these national data must be taken with caution, due to the sample size.



Graph 38: Share of workers who lift or move people, with gender breakdown



Graph 39: Share of workers facing lifting or moving people



Source: EUROFOUND (2016), European Working Conditions Survey

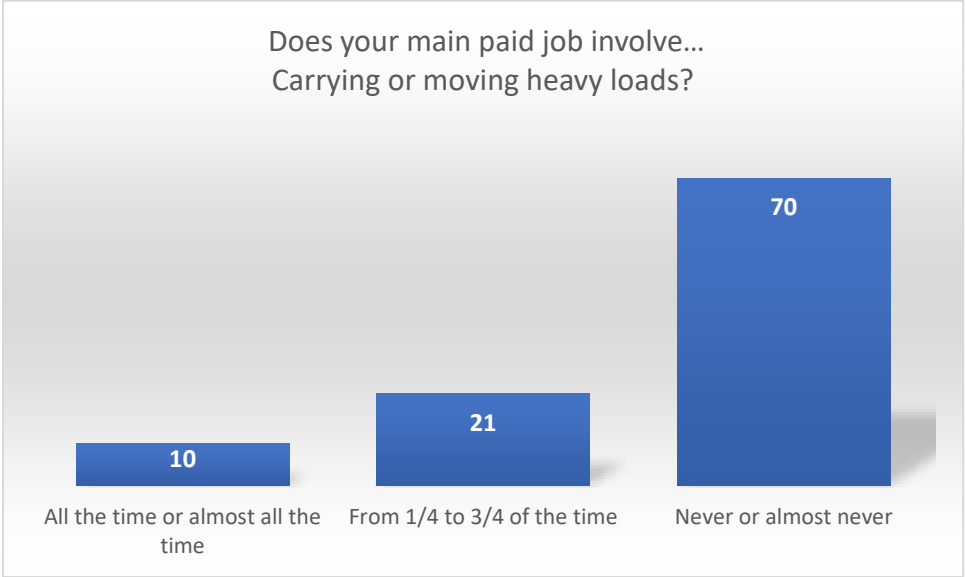
The gender breakdown shows that female employees are more exposed to lifting or moving people than men (see Graph 40). For instance, 69% of male employees never (or almost never) have to lift or move people, in comparison to 45% of female employees.



Carrying or moving heavy loads

Graph 40: Share of workers facing carrying or moving heavy loads

According to the European Working Conditions Survey, in the social services sector, 70% of the employees never (44%) or almost never (26%) carry or move heavy loads, which is similar to the EU workforce average (68%).



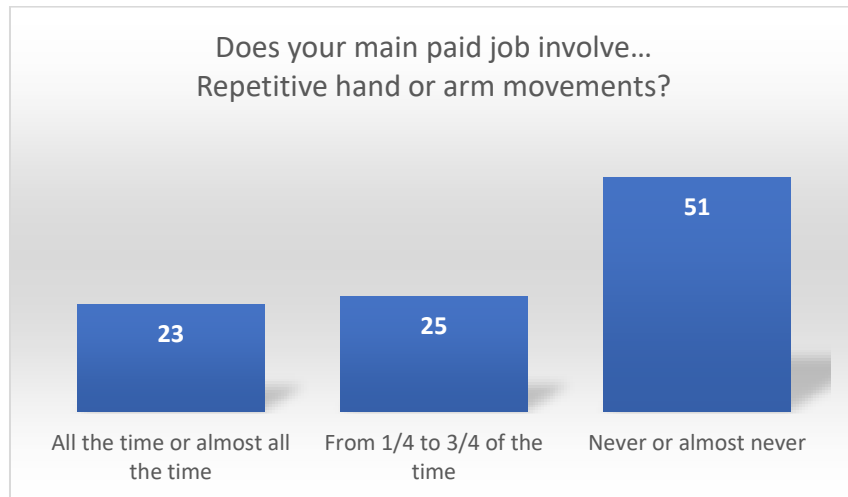
Source: EUROFOUND (2016), European Working Conditions Survey



Repetitive hand or arm movements

According to the European Working Conditions Survey, in the social services sector, 21% of the workforce experiences repetitive hand or arm movement all the time or almost all the time (compared to 31% in the broader economy). 27% of the workforce experiences repetitive hand or arm movement between $\frac{1}{4}$ and $\frac{3}{4}$ of their working time (compared to 30% in the economy as a whole) and 51% never or almost never face such situation (39% in the broader economy).

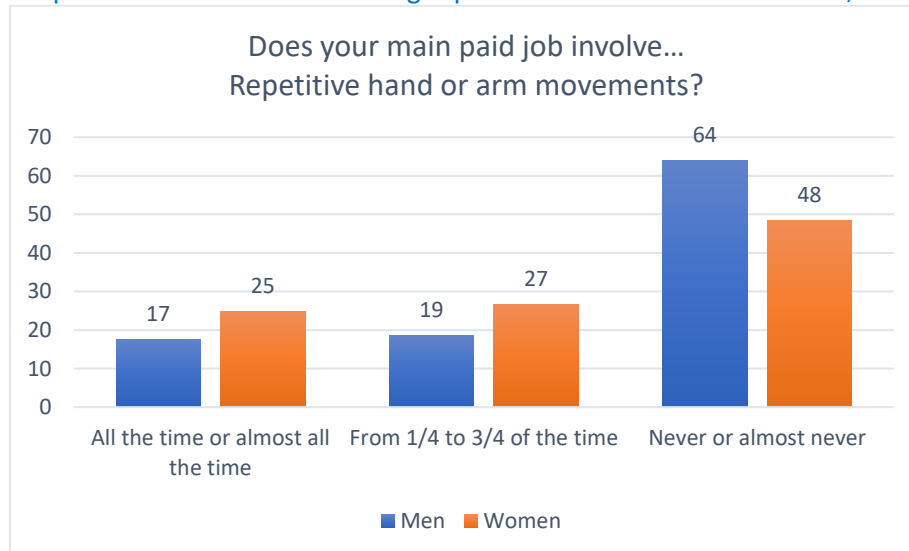
Graph 41: Share of workers experiencing repetitive hand or arm movements



Source: EUROFOUND (2016), European Working Conditions Survey

The gender breakdown shows that female employees are more exposed repetitive hand or arm movements than men.

Graph 42: Share of workers facing repetitive hand or arm movements, breakdown by gender



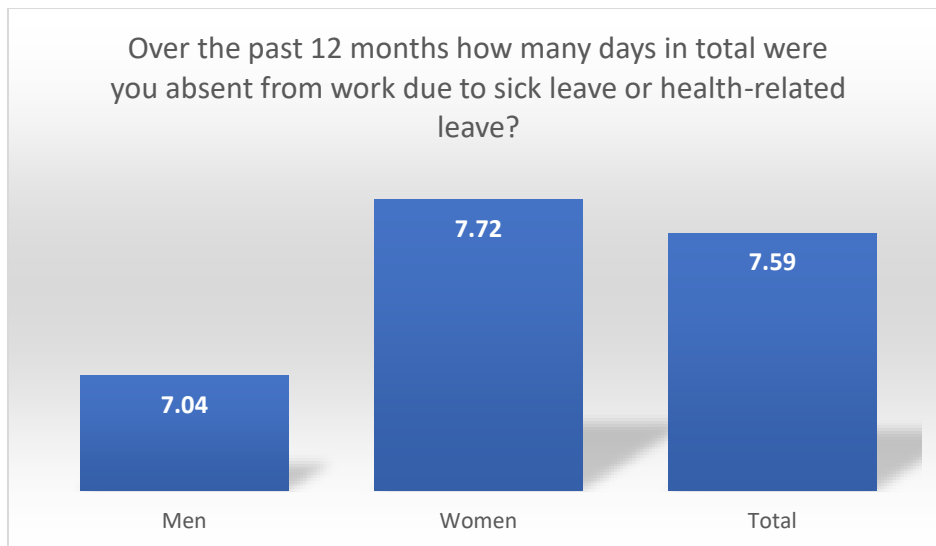
Source: EUROFOUND (2016), European Working Conditions Survey



Absenteeism and health

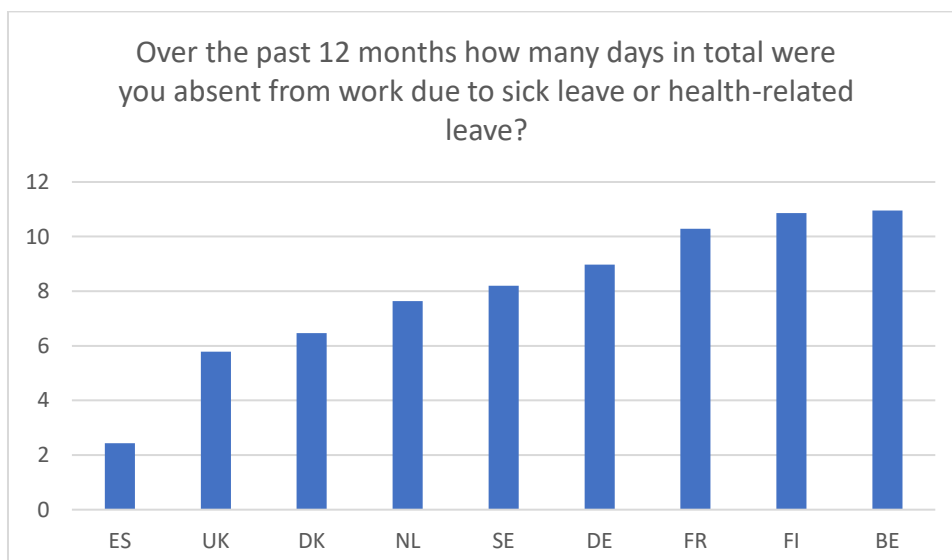
In the economy as a whole, 37% of the workforce in social services has taken between 1-15 days over the past 12 months for sick leave or health-related leave (in comparison to 36.54% in the whole economy). In the social services sector, on average, employees took 7.59 days over the past 12 months for health reasons. There are important differences between the countries, as is highlighted in graphs 45 and 46.

Graph 43: Number of days of sick leave taken by employees over the past 12 months, on average.



Source: EUROFOUND (2016), European Working Conditions Survey

Graph 44: Number of sick leave days taken by employees over the past-12 months, in average, per countries.



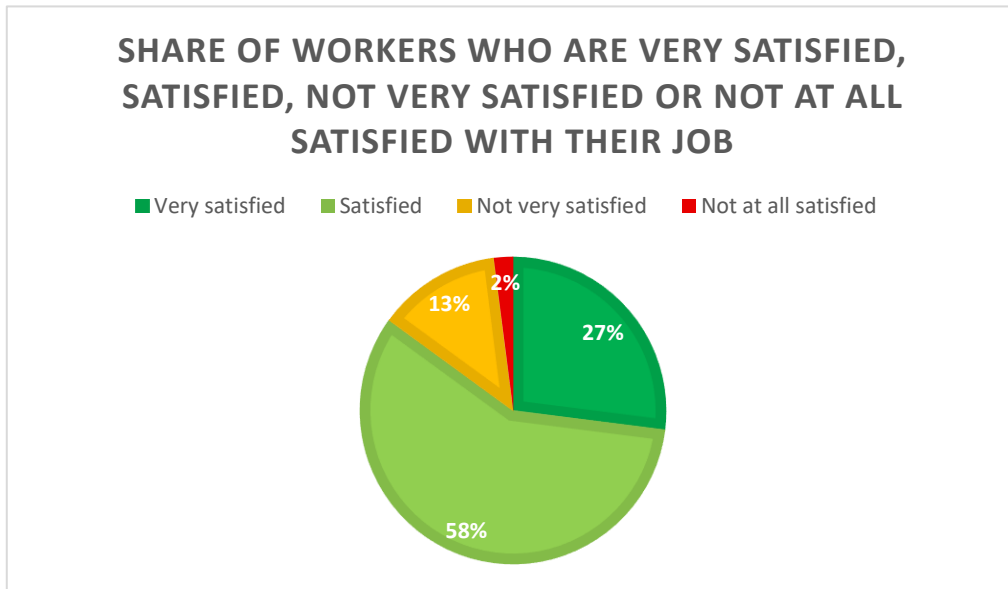
Source: EUROFOUND (2016), European Working Conditions Survey



4.6 Global evaluation of working conditions

In comparison to the broader economy, the workforce in the social services sector seems to be as satisfied with their working conditions as the whole EU workforce. 27% are very satisfied (compared to 26% for the broader economy) and 58% are satisfied (compared to 60% of the whole economy).

Graph 45: Share of workers who are very satisfied, satisfied, not very satisfied or not at all satisfied with their job



Source: EUROFOUND (2016), European Working Conditions Survey



5. Wage and purchase power

Wage setting

According to the Social employers' survey, wages are generally determined by a classification grid which is fixed by the applicable collective agreement (BE, DE, ES, FI, FR, NL, LU), but which does not prevent an individual bargaining (ES, FI, NL). The collective agreement generally sets a minimum wage, but this is not always the case. In some countries the minimum wage is only set by law (NL) sometimes because there is no collective agreement (SK). Note that in Slovakia, for non-public employers the sectoral minimum wage equals the legal minimum wage set yearly by a regulation multiplied by a difficulty coefficient which is also determined by the law. Wages in the sector are below the national average. For instance, in Finland, average wages in private social sector are 2650 €/month. This is below the national average which is around 3200 €/month, due to higher salaries in other industries.

Minimum wage

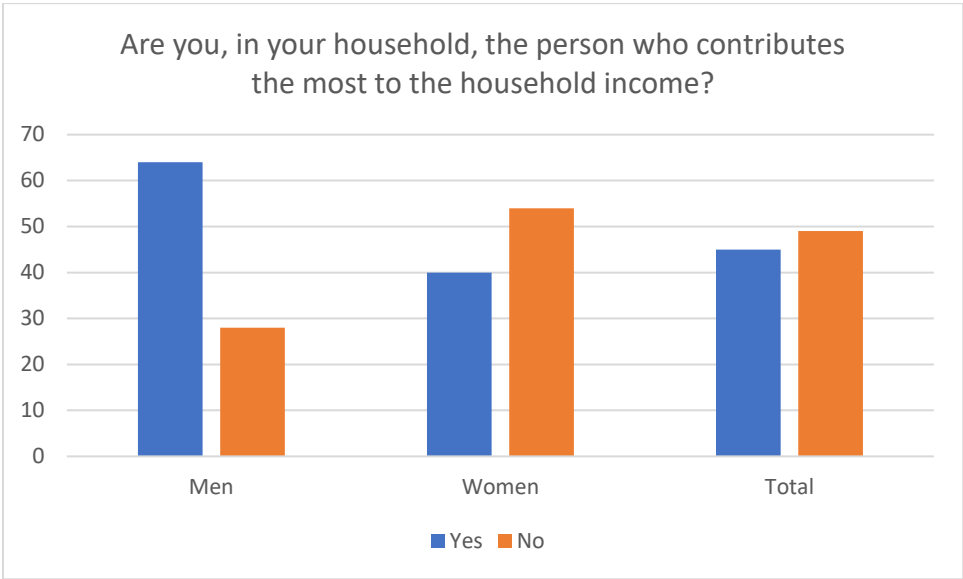
As explained above, in general a minimum wage is set by collective agreement. In Germany there is a minimum wage for the social services employees and a specific minimum wage (higher for employees working in the elderly healthcare specialty). The minimum rate differs between eastern and western Germany. In 2019, in western Germany, the minimum wage is generally €9.19 and €11.05 for employees working to provide healthcare to elderly people. In Lithuania, there is no collective agreed minimum wage, which is fixed by the law at €560 per months in the private social services and 1,041.49 in the public sector. Minimum wage also differs in Slovakia depending the sector: Minimum legal wage in the country is €2,99 per hours (2019) which also applies to public providers of social services. The rate increases to €3.59 for non-public providers with lowest difficulty coefficient. In Luxembourg, the social services sector minimum wage for unqualified employees reaches 124% of legal unqualified minimum wage and the social sector minimum wage for qualified employees reaches 136% of legal qualified wage. Most of the differences result from the 13th month paid in social sector.

Contribution to the household income

In the social services sector, 45% of the employees stress that in their household, they are the person who contributes the most to the household income. The breakdown by gender highlights an important difference between men and women: while 64% of the male employees are the person in their household who contributes the most to the household income, the rate decreases to 40% for female employees.



Graph 46: Person who contributes the most to the household income

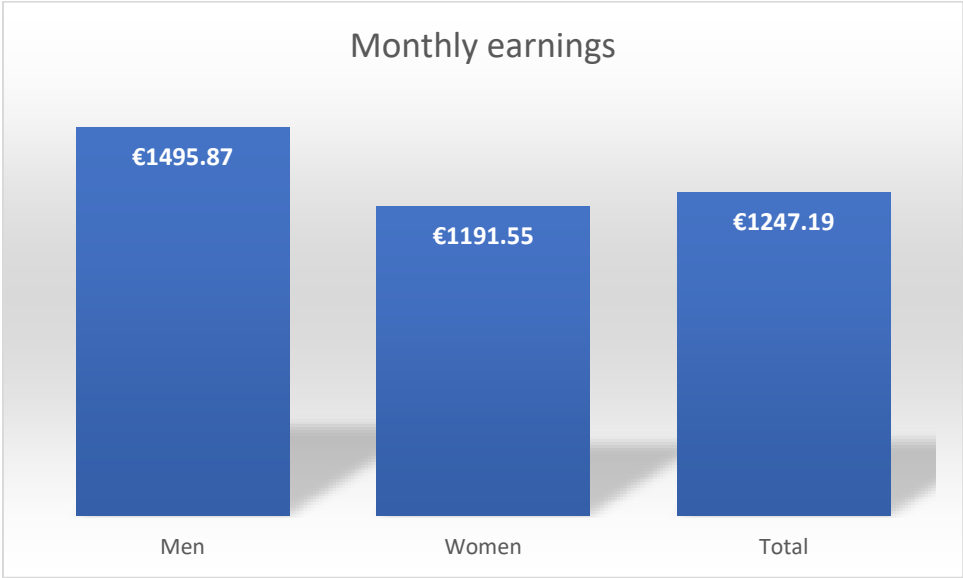


Source: EUROFOUND (2016), European Working Conditions Survey

Net monthly income

In the social services sector, according to the interviewed workers, their net monthly earnings from their main paid job reached €1,247.19, with a difference between female (€1,191.55) and male employees (€1,495.87)

Graph 47: Monthly earnings in the social services sector

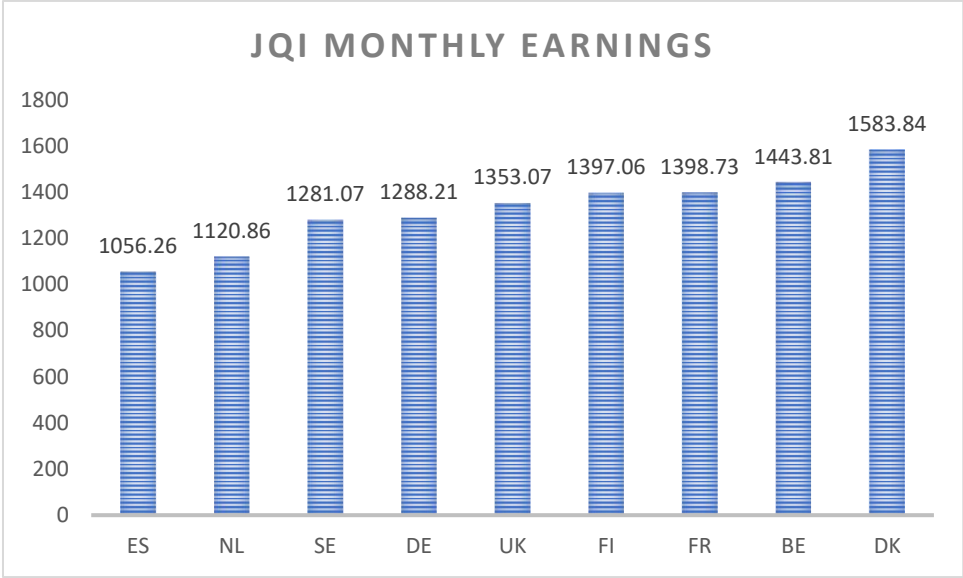


Source: EUROFOUND (2016), European Working Conditions Survey



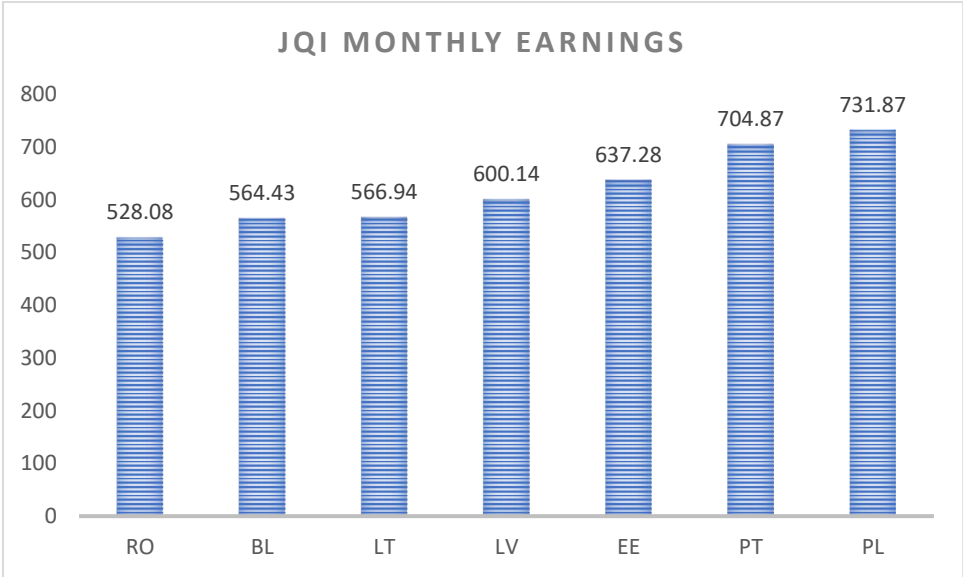
According to European Working Conditions Survey, the job quality index monthly (JQI) earnings²⁶ varied from €1,583 to €1,056 in the largest countries in terms of number of employees. The lowest incomes were mainly recorded in the new Member States, with the exception of Portugal.

Graph 48: Monthly earnings in the social services sector, by countries.



Source: EUROFOUND (2016), European Working Conditions Survey

Graph 49: Countries with the lowest monthly earnings in the social services sector



Source: EUROFOUND (2016), European Working Conditions Survey

²⁶ Monthly earnings from the main paid job, in euro, corrected for price differences between the countries.



6. Human resources challenges

This last section is mainly dedicated to the survey launched by Social employers to their national correspondents. A total of 10 countries responded to the questionnaire and have provided some comments that provide information on sectoral policies and challenges.

Discrimination

In the various countries that participated in the Social employers' study, the issue of combating discrimination is mainly addressed through the law. Few initiatives are reported in this area both at the sector and company level (CZ, DE, SK). However, some initiatives specific to the social services sector have been reported:

- In **France**, where there are two inter-branch collective agreements on gender equality and on diversity which apply to employers in the social economy, which covers part of social services.
- In the **Netherlands**, the employer organisation ActiZ has not developed an anti-discrimination policy, but it has implemented diversity programs. In the diversity programs, research has been done, a lot of material has been developed, courses have been set out, methodologies have been tested and adapted, working visits have been organized, knowledge has been shared and good examples have been made accessible.
- In **Lithuania**, some organisations have regulations at work to ensure gender parity, ethics, and disability equality. For instance, 19 institutions in the sector have reached Equass Assurance Quality provision of social services and in this framework, they have regulated these topics.
- In **Slovakia**, Quality standards set by the social law 448 / 2008 were to be implemented in all social services organisations by 31 August 2019. These quality standards also ensure gender parity, ethics and disability equality.

Harassment prevention

With the exception of **Luxembourg**, there is no sectoral agreement on combating harassment or stress prevention in the countries that responded to the Social employers' study. However, contractual provisions may be provided by company agreement in **France**, though this remains rare. In **Belgium**, collective sectoral or company agreements, which do not deal specifically with this subject, may provide protection against dismissal for the person lodging the complaint. In the **Netherlands**, factors such as stress and well-being are integrated into risk management tools, which are studied and evaluated twice a year. Initiatives are reported in **Germany**. In **Slovakia**, quality standards set by the law 448/ 2008 (see above) provide standards for combatting harassment and stress. Several countries do not report any innovative practices (BE, ES, LT).

Disabilities

The employment of people with disabilities is promoted in some countries through an obligation to employ a minimum number of disabled workers. According to the Social employers' survey, in **France**, there is a legal obligation to include disabled employees at a rate of 6% in the company workforce. Though, according to Social employers' national correspondent (Nexem), the rate is closer to 3.5% in the private sector. This obligation can be replaced by a collective agreement that allows for specific measures. It can also be completed by contracting with certain types of services, often run by social services, as sheltered workshops or rehabilitation centres. In **Slovakia**, employers with more than 20 employees must employ disabled persons, otherwise they have to pay a penalty. 3,2% of the total number of employees must be disabled. In **Luxembourg**, employers must also recruit a minimum



number of disabled people. There are no quota measures or hiring obligations in several countries (BE, DE, FI, LT) or a voluntary quota set at national level (NL).

Sectoral transformation and its impact on HR management

When asked about the public policies that will have the greatest impact on employment in the social services sector, several countries that participated in the Social employers survey highlighted the disinvestment of public authorities in financing social services in a context where the need of labour force to cope with an ageing population will increase (BE, FR, FI, SK). Countries are facing subsidy cuts (BE, FR) as well as the systematic use of tenders that drive prices down and increase controls on expenses rather than qualitative performance evaluations (BE).

The increase in need and labour shortages will lead social services to invest in digitalisation/e-health on a large scale, particularly to enable older people to live independently (BE, NL). Another approach mentioned is to organize communities of services and continuity of care (NL, LT, LU) and to organize a patient plan with an increased effort to coordinate among professionals (FR, LU). **These perspectives require increased skills of staff to use these new opportunities and tools (NL) and to strengthen their autonomy (FR). The necessary investment in training may make it difficult to manage working hours to compensate for absences (LU).**

Recruitment difficulties

All the countries covered by the Social employers' study recognize recruitment difficulties. This is especially the case for Social and educational intervention (front line support) as well as healthcare (NL, DE, LT, SK) or essentially healthcare (ES) activities. In France, the difficulties concern mainly healthcare (nurses, doctors, etc.) and certain regions (where life is expensive, in the countryside or in border areas with countries offering better salaries).

The reasons given for these recruitment difficulties are the low salaries (ES, FR), the sometimes difficult working conditions (FR), the insufficient number of students trained in certain health specialities (FR), the poor reputation of a sector in which it is difficult to make a career (NL, SK), the lower value of care provided to the elderly compared to hospital care (NL), the attraction of the labour market offering higher salaries (SK) and the increasing need for the social sector workforce in an ageing society (FI).

Skills shortage

All the countries covered by the Social employers' study recognize skill shortages. These skill shortages mainly affect health care staff (BE, CZ, DE, FI, FR, FR, LT, NL, SK) and social and educational intervention staff (DE, ES, FI, LT, NL, SK). The main shortages identified relate to hygiene, security, comfort (CZ, ES, FR, LT, SK) and medical care (ES, FR, LT, NL, SK) before dealing with difficult situations and supporting life path setting (3 countries each). Each correspondent was asked to select 2 or 3 main shortages, but two countries selected more, stressing a huge difficulty on a national scale regarding this issue.

Tables 5: Main skill shortages

	BE	CZ	DE	ES	FI	FR	LU	LT	NL	SK
- Persons' hygiene, security and comfort		X		X		X		X		X



Dealing with difficult situations					X			X		X
Analyse, evaluation, investigation in order to make a decision								X		X
Support to person's life path setting								X	X	X
Vocational communication and collaboration										X
Project management										X
Team / group management										X
Medical care provision					X	X		X	X	X
Ability to work without supervision / autonomy								X		X
Other							X ²⁷			

²⁷ Reporting and statistical skills especially in relation with obligations fixed by public authorities



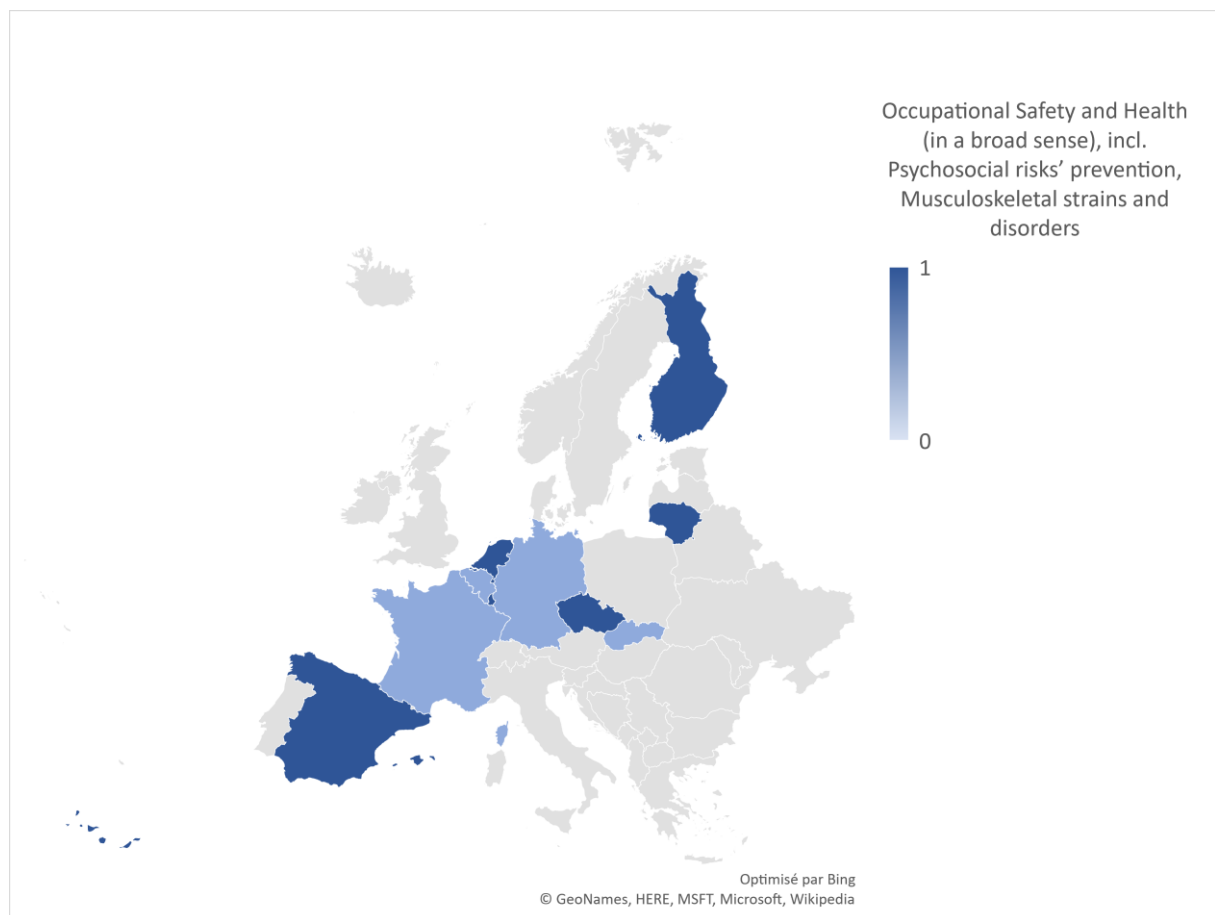
Retention difficulties

All the countries covered by the Social employers' survey face retention difficulties mainly for Healthcare (FR, DE), social and educational intervention activities (ES) or both (FI, NL, SK). Slovakia also faces retention difficulties in management and administration as well as accounting and logistics.

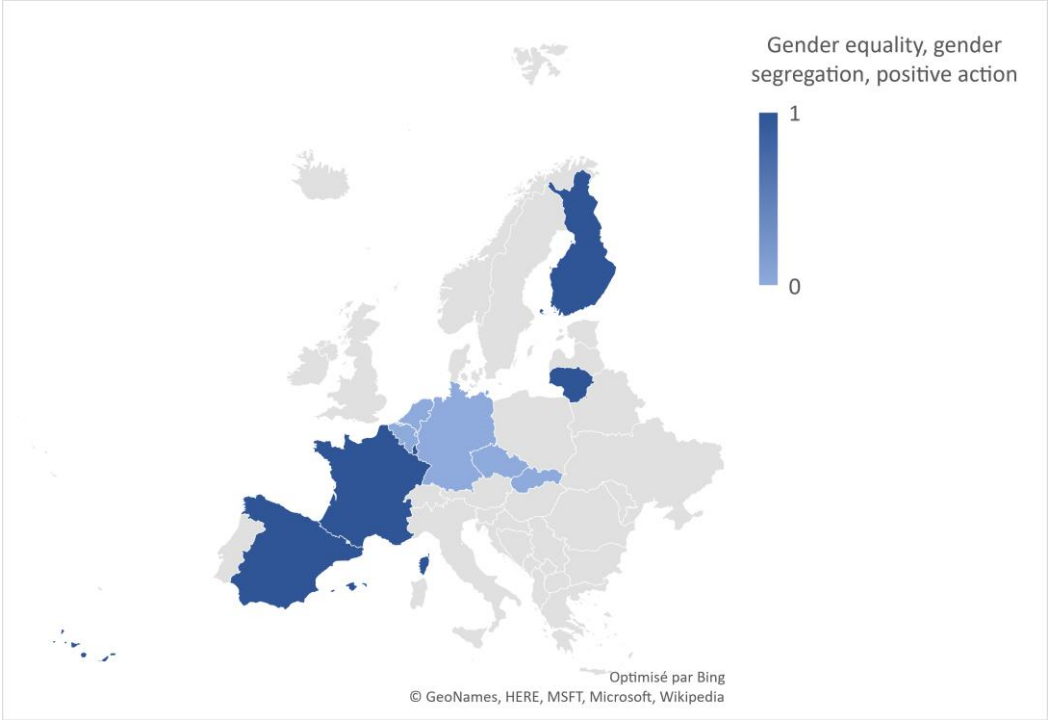
Existing collective agreements and/or practices

To cope with skills, qualification or workforce shortages, social partners may have developed initiatives. The table below shows the responses from the 10 countries that participated in the Social employers' survey regarding collective agreements and/or practices at their disposal to combat the different issues (see table 6, below). The three main challenges recorded are occupational health and safety (Graph 52), gender equality (Graph 53) and disabled people (Graph 54).

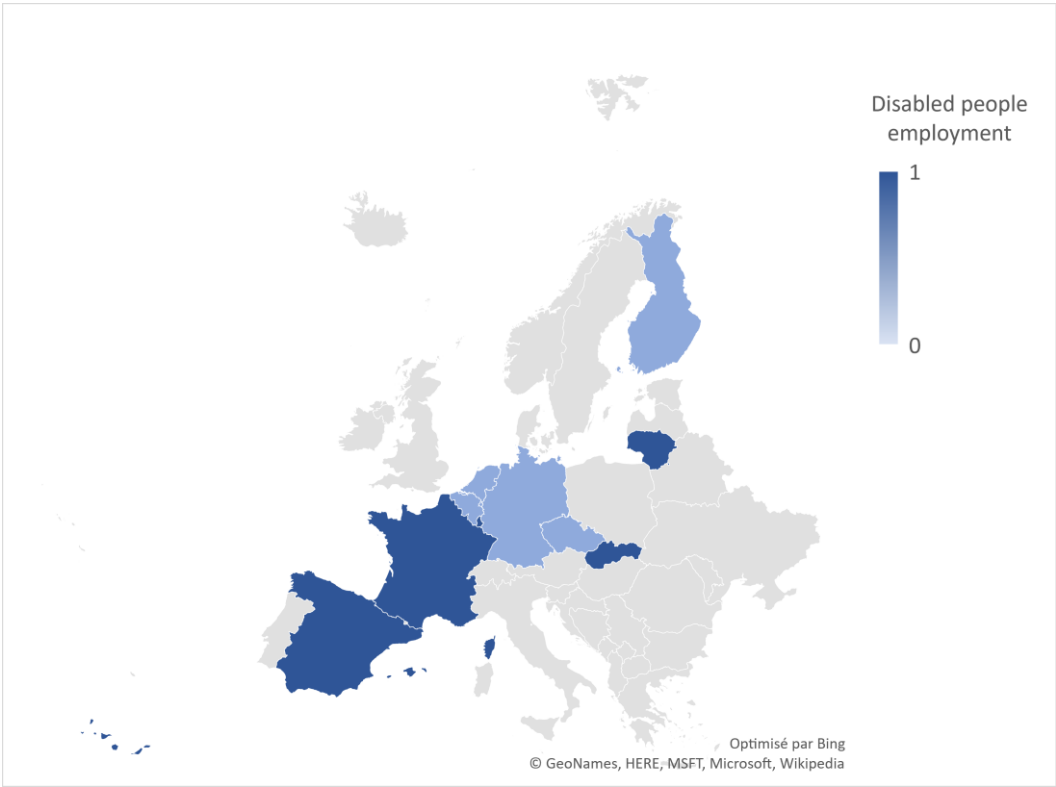
Graph 50: Existing collective agreement or practices to cope with occupational safety and health (Dark blue: yes, Light blue: no; Grey: no data)



Graph 51: Existing collective agreement or practices to cope with gender equality (Dark blue: yes, Light blue: no; Grey: no data)



Graph 52: Existing collective agreement or practices to cope with disabled people employment (Dark blue: yes, Light blue: no ; Grey: no data)



Tables 6: Existing collective agreements or practices to cope with employment and skill challenges

	BE	CZ	DE	ES	FI	FR	LU	LT	NL	SK
Recruitment and integration procedures	X			X	X					
Forward looking employment and skills management				X						
Occupational Safety and Health (in a broad sense), incl. Psychosocial risks' prevention, Musculoskeletal strains and disorders		X		X	X		X	X	X	
Wellbeing / quality of life at work / occupational exhaustion prevention		X			X					
Absenteeism's prevention					X	X			X	
Gender equality, gender segregation, positive action				X	X	X	X	X		
Disabled people employment				X		X	X	X		X
Ageing of the workforce			X	X	X					
Sustainable development at company/organisation level				X	X					

A few details have been given by the national correspondent.

- **Recruitment and integration procedures:** In Belgium, two studies have been launched, one in Wallonia on the recruitment and retention of staff in the aid and care sectors. The other in Flanders, on the growing recruitment needs.
- **Absenteeism:** in France, social partners have taken action to prevent absenteeism through the collective health insurance. In the Netherlands, at the request of the social partners, an offer of support for the absence approach for employers has been developed that is offered by 5 (advice) organisations. Various instruments and methods have been developed to promote sustainable employability for the Nursing and Home Care Sector.
- **Gender equality:** in France, there is a framework agreement on gender equality in the social economy which applies partially to the social services.
- **Ageing workforce:**
 - in the Netherlands, social partners have agreed to avoid nightshifts for employees who are 55 years old or over, and to allow them extra hours of leave. The employers' organisation ActiZ has also developed an HR tool for the senior staff: the use and stimulate senior staff in healthcare through examples.
 - In Germany, there are a few collective agreements which try to address the ageing workforce as a growing issue in collective bargaining. There is not a national policy which addresses this topic, but some companies do partake in programs on their own.
 - In Spain, the employers' organisation Lares promotes employment of senior workers. Some years ago, Lares even achieved the inclusion of a specific clause against age discrimination in the national collective agreement for senior care, a clause that still exists (last paragraph of art. 18 of the VII *Convenio Colectivo Estatal de Servicios de*



Atención a las Personas Dependientes y Desarrollo de la Promoción de la Autonomía Personal). This clause was a direct consequence of our participation in a European Project called "Seniors and Workplaces, SAW", with different employers' organisations and trade unions, e.g. SIPTU from Ireland. But on the other hand, Lares understands that many of the jobs in senior care and in other sub-sectors of the social services sector involve intense physical effort and that this may be an important problem for senior workers. This is why Lares would also like to see an improvement in the retirement laws for this type of workers, making earlier retirement possible without damaging effects on pensions.

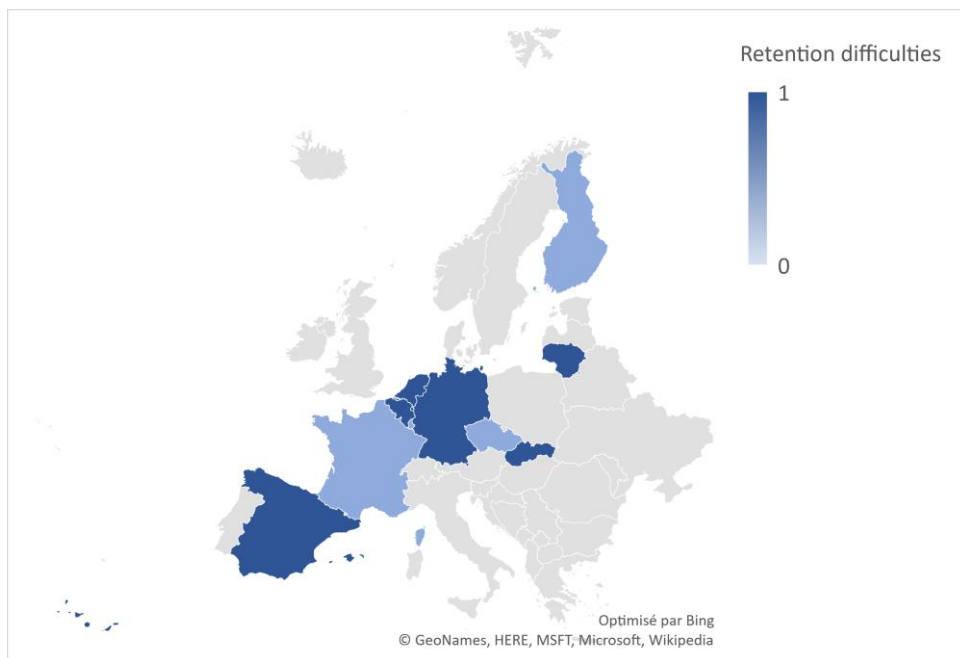
- **Sustainable development at company/organisation level:** in the Netherlands, there is a collaboration of ActiZ in a partnership of employers and employees' organisations that focuses on the joint interests of employers and employees. There are also aims to improve and promote the functioning of the labour market in the branch at a national level and offer various services, tools and products in the context of HR management such as: innovative measures focused on quality improvement of both care and work ; working smarter with less manpower and measures and instruments to make employability of staff more sustainable.



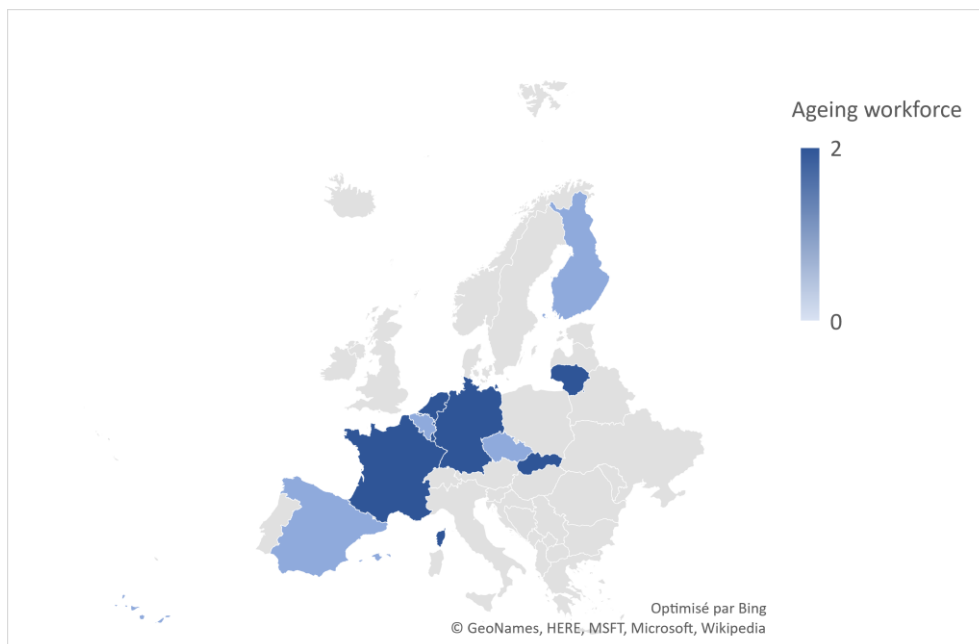
Future sectoral challenges

The national correspondents were asked to list the main developments or challenges they have had to cope with. Retention difficulties and ageing workforce were the most frequently cited (respectively 7 and 6 time) before migration, public policies, skills shortages and qualification shortages.

Graph 53: Countries where Social employers' organisations have to cope with retention difficulties (Dark blue: yes, Light blue: no, Grey; no data)



Graph 54: Countries where Social employers' organisations have to cope with an ageing workforce (Dark blue: yes, Light blue: no, Grey; no data)



Tables 7: The main developments or challenges for employers' organisations



With financial support from the European Union

	BE	CZ	DE	ES	FI	FR	LU	LT	NL	SK
Migrations	X			X			X	X		X
Public policies	X			X		X	X			X
Skills shortage	X			X		X			X	X
Qualifications shortage			X	X	X				X	X
Retention difficulties	X		X	X		X		X	X	X
Gender gap	X					X				
Ageing workforce			X			X	X	X	X	X
Society's transformations	X		X			X			X	
Social inclusion and trend to more person's centred services rise of people in needs?						X	X	X		X
Other? if so, which one?							X ²⁸			X ²⁹

²⁸ New forms of living structures for elderly people. New forms of living structures for elderly disabled people.
Use of public transport for employees (public transport will be free of charge up from March 2020 in Luxembourg).
Multiplication /proliferation of educational programs in the EU

²⁹ Inequality in financing of public and non-public social services providers.
Unequal accounting for public and non-public providers resulting in non-transparency of financing and expenses of public providers that are funded by towns/ municipalities.
Unequal wage conditions given by different laws for wage valuation of public (2,99 EUR/ hr) and non-public (3,59 EUR/ hr.) workers in social services.



7. Summary

An important and increasing workforce

In 2018, the social services sector employed about **10.9 million people in the EU**, with a total labour force of 230.4 million, according to Eurostat's Labour Force Survey. The sector represents **4.7% of the EU labour force**.

Furthermore, the sector has a **strong employment dynamic** with an increase in the number of people employed for 15 years or **more (24% between 2009 and 2018)**, while the EU workforce as a whole increased about 1.21% in the same period.

No decline was recorded during the 2008 economic and financial crisis. However, there are significant variations between Member States: nine countries recorded an employment growth of more than 30% over this period (IE, HU, LU, HR, SK, AT, PT, LV, MT) and two countries experienced staff reductions (NL, RO). Similarly, a large majority of countries experienced a reduction in their workforce after the 2008 crisis before returning to growth (except Denmark and the Netherlands).

According to the survey launched by the Federation of European Social Employers (Social employers), almost all the interviewed employers' organisations believe that **the number of employees is expected to increase further in the next two years**.

Employment in the social services sector remains **overwhelmingly female**. In the EU, women represent **81.56% of total employment**. The norm remains the permanent employment contract. This type of contract accounts for more than half of the workforce in six of the ten countries that participated in the survey.

The **50-64 age group represents more than a third of total employment** in the social services sector (34.6%), compared to 29.6% for the broader economy, and poses many challenges for operators in the sector, in terms of active ageing and recruitment to replace those staff who will retire in the coming years.

Industrial relations

In the private sector, the **social dialogue is strong**. All the national correspondents of the Social employers who responded to the survey highlighted that collective bargaining exists in their sector. Furthermore, in some countries, collective bargaining practices are observed at all existing levels.

Concerning the **affiliation to EU employers' organisations**, according to the responses provided by 10 Member States, it appears that national employers' organisations in the social services sector are rarely affiliated to other EU organisations.

Qualifications and training

Applicable collective agreements generally **include job classification**. Access to jobs in the sector is in principle reserved for people with a qualification recognised by the branch collective agreement and/or the law.



A large majority of employees in the social services sector estimate that their present skills correspond well with their duties (53%). However, almost **a quarter of the workforce feels that they need further training to cope well with their duties**. According to national correspondents, in general, employers are not required to organise a minimum number of training actions or to finance a minimum number of training hours per year but in some countries, employees legally enjoy an individual right to several days of training per year. Employees in the social sector are **more often involved in training paid by the employers than employees in the whole economy**.

Employers are generally not required to contribute to the financing of vocational training by devoting a certain proportion of the pay-roll and because of this, all employers' organisations feel that the **budget for vocational training is too low**.

50% of the workforce never (or almost never) works with computer, laptops, smartphones, (compared to 43% in the whole economy), but national correspondents estimate that the use of these tools will increase in the forthcoming years.

Working time: impact of part time work

According to the European Working Conditions Survey, workers in the social services sector work an average of **31,37 hours per week** in their main paid job. The main reason for the low average working time is the **importance of part-time work in the sector**. On average, workers in the social services sector work about **4.63 hours per day** at their main paid job.

On average, the workforce works **at night 1.49 times per month**, for at least 2 hours between 10.00 pm and 05.00 am. The practices of **standby time** and of **on-call work** are important, but not in all countries. The workforce works on average 1.09 **Sundays** and 1.24 **Saturdays** per month.

Concerning **working time flexibility**, the data from the social services sector and the economy as a whole are quite similar; 67% of the workforce has fixed starting and finishing hours (compared to 61% in the broader economy), 57% of the workforce works the same number of hours every day (compared to 56%); 64% works the same number of days every week (compared to 63%) ; 59% of the workforce never faces **short notice changes** of their working time arrangements , but when it happens, it is usually **only the day before for 10% of the workers or the day of for 7% of them which is significantly higher than the EU average (less than 1%)**.

However, a large part of the workforce considers that their **working hours fit well** (48%, but 7 points less in comparison to the EU average) or **very well** (33%) with their family or social commitments outside work.

Working conditions

In comparison to the entire economy, the workforce in the social services sector seems to be as **satisfied with its working conditions** as the EU workforce more broadly. 27% feel very satisfied (compared to 26% for the whole economy) and 58% are satisfied (compared to 60% of the whole economy). The **exposure to physical risks is quite similar in the social services as in the broader economy** (even though **female workers are more exposed to such risks** than male workers). However, the social services workforce is **more exposed to psychological risks**. **For instance, 15% of the workforce feel that they do not have enough time to get their job done (compared to 10% in the whole economy)**.



In the EU, according to the European Working Conditions Survey, a large part of the workforce (85%) feels that they are **always or most of the time doing useful work**. The rate is higher in the social services sector (94%).

Human resources challenges

Several countries that participated in the Social employers' survey highlighted the **disinvestment of public authorities in financing social services** in a context where the need of labour force to cope with an ageing population will increase. Countries are facing subsidy cuts or the systematic use of tenders that drive prices down.

The **increase in need and labour shortages** will lead social services to invest massively in digitisation/e-health. Another approach mentioned is to **organise communities of services and continuity of care** and to organise life-path counselling with an increased effort to coordinate between professionals in a more person-centred approach, within the community. These perspectives require increasing skills of staff to use these new opportunities and tools and to strengthen their autonomy.

All the countries covered by the Social employers' survey are coping with **difficulties related to recruitment, qualification shortages and workforce retention** mainly for the specialties of healthcare, and social and educational intervention.

The reasons given for these recruitment or attractiveness difficulties are **the low salaries practiced**, the **difficult working conditions**, the **poor reputation** of the sector and for Eastern European countries, the **attraction of a labour market offering higher salaries** and the increasing need for the social sector workforce in an ageing society.

